MARKETING WATCHABLE WILDLIFE TOURISM IN ALBERTA

(Markets/Opportunities/Marketing)

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March, 1990

Prepared for

Alberta
TOURISM

Alberta
FORESTRY, LANDS & WILDLIFE

ALBERTA'S
WATCHABLE
WILDLIFE

91-06259/

TO WHOM IT MAY CONCERN

The attached consultant's report provides an assessment of the wildlife viewing market in Alberta. The study provides information related to the demographics of wildlife tourists, participation rates and economic benefits related to wildlife viewing. An assessment of currently available wildlife viewing products is included and a marketing strategy is suggested. The consultants also identify data gaps in available information and recommend initiatives to address the identified gaps.

It should be noted that this study was conducted by a team of independent consultants commissioned by the departments of Alberta Tourism and Alberta Forestry, Lands and Wildlife and does not represent government commitment or policy.

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ACKNOWLEDGMENTS

This report is the product of the efforts of many people whose active cooperation and constructive efforts resulted in this assessment of watchable wildlife tourism in Alberta.

In particular, we acknowledge the contributions of those who gave of their time to participate in discussion group sessions. We thank the participants from the following:

- The Town of Bonnyville
- The City of Lethbridge
- The City of Calgary
- Wildlife professionals in Edmonton
- Representatives of non-government organizations

We express our appreciation for the comments and insights provided by the many people we interviewed in Alberta, Canada and the United States.

The following Alberta Government representatives guided the direction of our work:

- Alison Coyne
- Terry Duffy
- Brian Payne
- Paul Short
- Harry Stelfox

We especially recognize the contribution made by all the big and little creatures who share their beauty and habitat with all who care to see and learn from them.

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SUMMARY

WATCHABLE WILDLIFE TOURISM IN ALBERTA

Although residents and non-residents participate in a variety of wildlife viewing activities in Alberta, development of viewing products and marketing of opportunities represent relatively new initiatives. The quality of Alberta's watchable wildlife resource is world class, the interest of residents and non-residents is high, the current economic benefits to Alberta are very large, and the potential additional economic benefits are significant.

While it may be tempting to move quickly into a broad variety of wildlife promotions, there are numerous issues which must be addressed if Alberta is to fully realize the large potential of Watchable Wildlife Tourism in a sustainable manner. Co-ordination of marketing activities with sustained resource protection and development of quality viewing products and opportunities is essential. Products and opportunities that are promoted must be deliverable in a manner compatible with market expectations.

S.1 Major Findings

INTEREST: Interest in wildlife-related activities is growing to the extent that in 1987 approximately 95% of the Alberta population participated in wildlife-related activities.

PARTICIPATION: In 1987, almost one quarter of Albertans over 15 years of age made a trip specifically for the purpose of "watching" wildlife. Non-participants, who expressed an interest in wildlife viewing, represent a very large potential market for Watchable Wildlife Tourism.

MARKET PROFILE: Albertans and other Canadians who participate in wildlife viewing trips or outings come from all areas of the

province and are well represented in all sex, age, income, and education groups.

WILDLIFE-RELATED ACTIVITIES: Watchable wildlife tourism products must cater to preferred tourist activities which, in descending order of preference, are viewing, photographing, studying and feeding wildlife.

OTHER JURISDICTIONS: Most jurisdictions in Canada and the U.S. are in the early stages of developing and implementing wildlife viewing programs. Alberta is well positioned with respect to its markets, quality of its wildlife resources, and level of development relative to other jurisdictions.

U.S. MARKETS: The profile of U.S. participants in wildlife-related activities is very similar to that of Canadians. The areas of the U.S. with the greatest potential for wildlife tourism in Alberta are the west coast urban centres and selected eastern urban centres.

CHARACTERISTICS OF NON-RESIDENT MARKETS: While there is little specific data on non-residents who may be interested in travelling to Alberta for the primary purpose of wildlife viewing, other studies suggest they are likely to be younger, have post-secondary education, earn higher than average incomes, and reside in urban centres.

MARKET GROWTH: In both Canada and the U.S., the growth in participation has increased substantially. Wildlife viewing tourism, particularly bird-watching, is considered to be one of the fastest growing leisure-time activities.

ECONOMIC BENEFITS: In 1987, Albertans spent $305.4 million on trips or outings for the primary purpose of viewing wildlife. Since viewing opportunities are found throughout the province,

further development of wildlife tourism will result in significant regional economic benefits.

RESOURCE CONCERNS: The literature, discussion group participants and professionals interviewed all emphasize the importance of a strong commitment to resource protection and management if wildlife viewing tourism is to be developed and promoted on a sustainable basis.

PRODUCT CHARACTERISTICS: To maximize market appeal, it will be necessary to:

- provide a diversity of sites and quality viewing experiences;
- develop two or three major interpretive centres;
- provide opportunities for children and families;
- incorporate opportunities for photography and educational interpretation in viewing programs; and
- develop many viewing opportunities in or close to urban centres.

PREFERRED SPECIES: While more people participate in bird-watching, surveys indicate a preference for viewing larger mammals. Sites will have to reflect opportunities for viewing all types of species.

TOURIST REQUIREMENTS: The out-of-province tourist will demand a high level of experience and service, including good viewing opportunities, knowledgeable guides, quality interpretive material and high quality accommodation and food services.

CONSUMPTIVE AND VIEWING ACTIVITIES: The markets for wildlife viewing and hunting activities overlap considerably. The majority of hunters are wildlife viewers. Both types of activities should be provided in a complementary manner.

GUIDES AND OUTFITTERS: They have good potential for providing watchable wildlife opportunities and their interest in doing so is strong. Assistance with major product upgrading, interpretation and marketing is required.

WILDLIFE TOURISM: Wildlife tourism in Alberta will require the following:

- a better understanding of the factors that motivate residents and tourists to wildlife viewing;
- development of a good level of site infrastructure along with resource protection; and
- creating a market awareness of the opportunities and resources.

S.2 Major Recommendations

ALBERTA'S WATCHABLE WILDLIFE RESOURCE: Alberta can market itself as the only place in the world with a diversity of major wildlife attractions in relatively unspoiled prairie, northern forest and Rocky Mountain environments.

WATCHABLE WILDLIFE TOURISM PLAN: Watchable wildlife programs need to be strengthened and a coordinating committee established between government and the private sector to successfully implement a watchable wildlife tourism plan. The aim of the plan is to develop a hierarchy of opportunities to appeal to a broad variety of tourists.

PRODUCT DEVELOPMENT: Substantial improvements in wildlife viewing products are required. Resource protection and management, additional market research, a variety of print material and interpretive facilities, and training and regulation of private sector operators are high priorities.

PROTECTION AND MANAGEMENT OF WATCHABLE WILDLIFE RESOURCES: In order to develop the watchable wildlife resource, a major commitment to wildlife tourism and protection of additional wildland and wildlife resources is required. There is a need for a comprehensive public lands policy which addresses protection, management and access issues. Timing is critical--Alberta could lose market share and watchable wildlife tourism resources if it does not respond quickly.

RESEARCH: Research is required to identify potential future markets through identification of motivational factors and user preferences. There also needs to be a cost-benefit analysis of wildlife tourism relative to other competing land and water uses.

INITIAL MARKETING STRATEGY - ALBERTA: A Wildlife Viewing Guide promotion sponsored by major retailers could deliver this publication to a large number of Albertans. A Wildlife "Stamp Around Alberta" book would greatly increase interest in wildlife viewing. Print media articles and electronic media coverage are essential to a successful campaign. A wildlife events calendar, incorporation of wildlife viewing attractions into other travel promotions and maps, and a travelling display are also required.

INITIAL MARKETING STRATEGY - OUT-OF-PROVINCE: Superb and relatively well-facilitated (e.g., access, accommodations, identification) wildlife attractions should be promoted first. The Trans-Canada Highway-Drumheller, Trail of the Great Bear, and Northern Woods and Waters for provide important auto touring opportunities, while Willmore-Kakwa and Wood Buffalo are ideal for adventure travel. National and international conservation magazines will be a major vehicle for promotions. Special markets such as zoological societies and adventure tour operators will also be tested.

EDUCATION: Education, beginning in the earliest school grades, is a key to long-term sustainability of wildlife tourism--appropriate course materials must be developed.

LINKAGES: It is essential that promotions link wildlife attractions and other tourism attractions which may be of interest to wildlife viewers.

RESOURCING: General revenue, lottery funds, and corporate sponsorship of specific programs are seen as the major funders for product development and overall promotion. While government will be the major catalyst, the private sector will play a significant role in operating and promoting specific attractions. Non-government organizations can play important roles in education programs and stewardship of important wildlife viewing areas.

1.0 INTRODUCTION

1.1 Study Background

During the past decade the importance of wildlife to Canadians has become increasingly clear to both federal and provincial agencies. Two significant national surveys in 1981 and 1987 on "The Importance of Wildlife to Canadians" (Filion et al., 1983; Federal-Provincial Task Force, 1989)* revealed wildlife-related activities as one of the most prevalent forms of recreation activities undertaken by Canadians. These surveys found that over 91% of Canadians participate in some form of wildlife-related activity, either consumptive or nonconsumptive. These same surveys determined that approximately 22% of the total population, and greater than 22.3% of Albertans, participated in primary nonconsumptive wildlife-related trips.

Wildlife viewing is experiencing rapid growth and is becoming a strong motive for leisure and travel, particularly in Western Canada. The potential for wildlife viewing tourism in Alberta is substantial given the diversity of Alberta's wildlife resource and wildlands. Wildlife viewing activities which include watching, photographing, studying, and feeding wildlife and buying wildlife art and souvenirs contribute millions of dollars to the provincial economy in associated expenditures.

In 1987, for example, Albertans spent $305.4 million on primary nonconsumptive wildlife-related trips. This money was spent on equipment, transportation, food, and accommodation (Canadian National Survey Data).

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* Future references to the two surveys will read "Canadian National Survey Data."

Currently, wildlife viewing opportunities in Alberta are underdeveloped. Successful development of viewing opportunities requires an assessment of existing demand, of resources, products, and the development of a marketing strategy to take advantage of existing and potential opportunities.

This study was commissioned jointly by Alberta Tourism and Alberta Forestry, Lands and Wildlife to assess the Alberta market for wildlife viewing tourism and to develop a marketing strategy.

1.2 Objectives

The goal of the study is to further the understanding of wildlife viewing tourism markets in Alberta and to provide direction for future product development of nonconsumptive wildlife tourism activities. The study has four specific objectives:

i) undertake an assessment of the wildlife viewing market in Alberta to include a description of market characteristics and assessment of currently available wildlife viewing products;

ii) prepare a product development and marketing strategy;

iii) identify data gaps in the available information on wildlife viewing tourism and products; and

iv) recommend appropriate initiatives to address the identified gaps.

1.3 Definition of Terms

Some of the terms used in the report are defined as follows:

.Wildlife:

All wild species including mammals, birds, reptiles, amphibians, fish, butterflies and wildflowers in association with their habitat.

.Product:

A specific service, object or opportunity available to potential customers.

.Package:

A series of products assembled in an integrated fashion and available to customers.

.Consumptive:

Refers to activities which remove wildlife from their habitat either by hunting, fishing, or trapping.

.Nonconsumptive (wildlife viewing):

Refers to activities such as studying, photographing, viewing or feeding which do not remove wildlife from their habitat.

.Primary nonconsumptive trip or outing:

A trip or outing away from home for the primary purpose of pursuing wildlife viewing activity.

.Wildlife tourism:

A primary nonconsumptive trip or outing outside the home community.

1.4 Study Approach

The major steps in this study included the following:

i) a review of Canadian data and studies including the 1981 and 1987 national surveys on the Importance of Wildlife to Canadians and pertinent Canadian literature;

ii) a review of U.S. data and studies including the National Surveys of Hunting, Fishing and Associated Wildlife Recreation, and selected wildlife literature;

iii) interviews with various representatives of Canadian provincial and American state governments, representatives of non-government organizations, wildlife experts, and private tour operators and outfitters;

iv) discussion group sessions with members of the public in Bonnyville, Calgary and Lethbridge, and with wildlife professionals and non-government agencies and organizations in Edmonton; and

v) three workshops with the client to review findings and provide direction to the work.

2.0 WATCHABLE WILDLIFE MARKETS AND PRODUCTS

This chapter provides a summary of the research completed during the study. Canadian and American wildlife viewing markets and products are examined and results of the interviews and the five discussion group sessions presented. Detailed information is presented in Appendix A: Canadian National Wildlife Surveys, Appendix B: United States National Wildlife Surveys, Appendix C: Wildlife Viewing Discussion Groups and Questionnaire Responses, and Appendix D: Wildlife Viewing and Tourism Interview Summary Results.

2.1 Market Research: Survey Data and Studies

The market research includes a review of Canadian and U.S. national surveys and relevant literature.

2.1.1 Canadian Markets

In 1981, 19.4% of Canadians over 15 years of age took a trip or outing away from home for the primary purpose of viewing, feeding or photographing wildlife. In 1987, this number increased to 22.0%. While the participation rate demonstrates a modest increase of 2.6% over the six-year period, the total number of Canadians participating increased from 3.6 million to 4.4 million (Canadian National Survey Data). This represents a significant increase in total participation of 22%, partly attributable to an increase in the size of the Canadian population.

Participation in wildlife tourism varies by province. In Alberta, in 1987, 22.3% of people over 15 years of age took a trip for the primary purpose of viewing, photographing or feeding wildlife. This compares to 25.1% in British Columbia, 18.3% in Saskatchewan and 22% for all of Canada (Canadian National Survey Data). These data do not provide an indication of where people participated. Undoubtedly, some Albertans travelled outside Alberta, while other Canadians may have come to Alberta.

Wildlife viewing is often part of other outdoor activities. Wildlife is an added bonus if it is seen incidentally while participating in other outdoor activities. Studies show that the opportunity to view wildlife is a major motivation for travel to Canada and particularly to British Columbia (Canada/British Columbia Economic and Regional Development Agreement, 1988).

Adventure travel, of which nature observation is part, has increased tremendously in popularity. Growth in this market is estimated at 15%-20% per year. The best growth opportunities are river rafting, trail riding, bicycle touring and nature observation (Tourism Research Group, 1988).

Estimates of adventure travel client days are presented in Table 1. This table shows that British Columbia is much better positioned than Alberta in offering adventure products; however, Alberta is better positioned than the other western provinces and Northern Territories.

Table 1

Volume of Adventure Travel in Western Canada (1986)

Region	Client-Days	No. of Operators
British Columbia	1,044,600	396
Alberta	46,000	87
Yukon	5,000	41
Saskatchewan	20,000	23
N.W.T.	6,000	82
Manitoba	20,000	N/A

Source: Tourism Research Group, 1988.

This same report concludes that the resource in western Canada is world class; however, to date development of opportunities has been limited. . Furthermore, much of the market is domestic and understanding of the domestic market is limited.

Table 2 provides a profile of Canadians who participated in primary nonconsumptive wildlife-related trips or outings in 1981 and 1987. The following conclusions can be drawn from the table:

. Slightly more males (52%) than females (48%) participated in wildlife-related trips. However, this must be interpreted carefully because greater than 95% of hunters are also nonconsumptive users and almost all are male. If only nonconsumptive users are considered, it is likely that there would be a higher proportion of females than males.

. Younger age groups tend to be overrepresented relative to their distribution in the population. This is particularly true of the 25 to 34 year age group (28.6% participation rate vs. 23.1% of the population in 1987); however, since 1981 the proportion of younger age groups in the population has decreased. It is noteworthy that participants over 45 years of age make up almost 30% of all participants.

. Participants with higher levels of education are overrepresented relative to their distribution in the population; however, the majority of viewers are people with lower levels of education. In 1987, 58% of participants had less than or no more than secondary school education.

. Higher income earners tend to be slightly overrepresented relative to their distribution in the population; however, 37% of participants earn less than $10,000 per year and 58% less than $20,000 per year. Students and the retired are also part of low-income categories.

Table 2

Profile of Canadians Participating in Primary Nonconsumptive Wildlife-Related Trips or Outings in 1981 and 1987 with Profile of All Canadians for Comparison*

Demographic Characteristics	1981 (Percent)		1987 (Percent)	
	Participants	All Canadians	Participants	All Canadians
Sex				
Male	52.4	49.0	52.0	48.9
Female	47.6	51.0	48.0	51.1
Age				
15-19 years	12.8	11.9	9.4	9.2
20-24 years	14.4	12.6	11.1	10.7
25-34 years	27.9	22.4	28.6	23.1
35-44 years	16.8	16.2	21.5	19.1
45-54 years	10.6	13.2	11.3	13.0
55-64 years	9.0	11.6	8.7	11.7
65 years +	8.5	12.2	9.4	13.2
Education				
0-8 years	15.7	20.5	12.3	15.6
Secondary school	50.6	51.0	45.8	47.9
Some post-secondary	10.4	8.7	11.1	10.4
Post-secondary certificate or diploma	12.4	10.6	15.5	13.7
University	10.8	9.2	15.3	12.4
Residence				
Rural	29.1	29.5	27.6	27.0
Urban	70.9	70.5	72.4	73.0
Personal income				
Less than $5,000	--	--	25.3	28.3
$5,000 to $9,999	--	--	11.9	13.4
$10,000 to $19,999	--	--	20.9	21.1
$20,000 to $29,999	--	--	17.5	16.6
$30,000 to $39,999	--	--	11.7	10.0
$40,000 or more	--	--	12.7	10.6

* Population 15 years of age and older.

Source: Canadian National Survey Data.

The key finding of this socio-demographic profile is that all sectors of the population participate in primary nonconsumptive wildlife viewing trips or outings. This is particularly significant when planning viewing opportunities and marketing for domestic markets. The U.S. National Surveys also show the same general profile of wildlife viewing participants. What these data do not provide is a profile of the wildlife viewer who travels long distances within a province, between provinces, or to another country to view wildlife.

The market for adventure travel products with the most potential for growth consists of individuals or couples, 35 to 50 years of age, with high levels of income and education, and from urban centres (Tourism Research Group, 1988). These people are willing to pay for a unique, high-quality experience. While there are no statistical data to substantiate this, it is quite possible that this profile is generally descriptive of the non-resident tourist travelling to Alberta for wildlife viewing and related experiences.

The existing data do not readily allow for segmentation of the market by specific user profile. It is recognized that there are several categories of wildlife viewing opportunities: urban, rural, backcountry, etc. It is quite likely that some market segmentation is based on the characteristics of the opportunities. Four viewing zones that are characterized according to levels of development, infrastructure and accessibility are urban, frontcountry, midcountry, and backcountry (Canada/British Columbia Economic and Regional Development Agreement, 1988). It is possible to speculate on the various market segments for each zone. There may also be additional market segments based on very specific interests (e.g., birders). Primary research is necessary before market segments can be more clearly identified and targeted.

Without specific information on the various markets and their characteristics, development of viewing opportunities at this time should encompass a lot of variety, i.e., geographical dispersion,

access, degree of interpretation, levels of development, and variety of species for viewing. Marketing and promotion strategies for the domestic market should be as broad as possible to appeal to all segments of the population. Marketing and promotion strategies for the non-resident market should be designed to appeal to specific interest groups and/or the urban dweller with higher income and education levels.

The Canadian findings presented in this section apply to Alberta. Specific findings about the Alberta markets are presented in the following pages.

2.1.2 Alberta Markets

As mentioned earlier, in 1987 22.3% of Albertans participated in a trip for the primary purpose of viewing wildlife. Over eighty-five percent of all Albertans polled expressed some or great interest in participating directly or indirectly in nonconsumptive wildlife activities. Only 13.6% expressed no interest (Canadian National Survey Data, 1989). Table 3 presents the number and percentage of Albertans who participated in various wildlife-related activities in 1981 and 1987.

In 1987, 92% of Albertans participated in indirect wildlife activity. Indirect wildlife activity includes such things as watching a wildlife T.V. program or reading a nature magazine. Although seemingly remote from wildlife tourism, people who participate in indirect activities have an interest in wildlife and represent a potential market for wildlife tourism.

The data in the table show that, with the exception of hunting, wildlife-related activities have become increasingly popular with Albertans. The level of interest and participation by Alberta residents is high. Greater than one in five Alberta residents, over 15 years of age, took a trip or outing in 1987 with the specific purpose of viewing, feeding or photographing wildlife.

Table 3

Number and Percentage of Albertans* Participating in Wildlife-Related Activities During 1981 and 1987

Wildlife-Related Activity	1981 Number (Thousands)	1981 Participation Percent	1987 Number (Thousands)	1987 Percent
Indirect activity	1,450.2	89.1%	1,626.7	91.7%
Residential activity	1,059.1	65.1%	1,213.2	68.4%
Primary nonconsumptive trip or outing	325.7	20.0%	395.9	22.3%
Incidental wildlife encounter during other trip or outing	926.1	56.9%	1,012.0	57.1%
Hunting activity	185.6	11.4%	180.9	10.2%

* 15 years of age and older.

Source: Canadian National Survey Data.

The significant conclusion is that Albertans comprise a large wildlife tourism market with the potential for an even larger market through the provision of viewing opportunities and the development of awareness.

Development of this market in Alberta could provide substantial economic benefits to the province, particularly if residents are encouraged to participate in Alberta. This would reduce tourism expenditure leakages to other jurisdictions.

The demographic characteristics of Albertans participating in wildlife tourism are very similar to the average Canadian participant. There is proportionally larger participation among residents 25 to 44 years of age, with post-secondary education and

higher incomes. What is more important, however, is that all income, age and education groups are well represented. Wildlife viewing tourism obviously appeals to a very broad spectrum of Albertans.

Table 4 presents the numbers and percentage of Albertans who participate in specific activities while on wildlife-related trips or outings.

Table 4

Number and Percentage of Albertans*
Participating in Wildlife-Related Activities While on
Primary Nonconsumptive Wildlife-Related Trips or Outings in 1987

Wildlife-Related Activity	Number (Thousands)	Participation Percent
Albertans taking a primary nonconsumptive trip or outing	395.9	22.3
Watching wildlife	334.4	18.9
Photographing wildlife	173.0	9.8
Studying wildlife	145.4	8.2
Feeding wildlife	63.9	3.6

* 15 years of age and older.

Source: Canadian National Survey Data.

Watching wildlife (18.9%) is the most popular activity for the 22.3% of Albertans who participate in wildlife-related tourism, followed by photographing (9.8%), studying wildlife (8.2%), and feeding wildlife (3.6%). There are several significant implications associated with this information:

. The 22.3% of Albertans who participate represent close to 400,000 Albertans. They take at least one trip or outing per year for the primary purpose of viewing wildlife. This large number of users makes it essential that wildlife tourism opportunities are

spread throughout the province. The provision of many sites and opportunities will satisfy the resident market and help to reduce impacts associated with overuse of a few sites.

. Sites and opportunities should specifically cater to photography. Close to half of all Alberta wildlife tourists (173,000 people), photograph wildlife while on outings. Approximately 50% of all Albertans expressed an interest in participating or continuing to participate in wildlife photography or study.

. Sites should promote the study of wildlife. This requires interpretive and other educational materials. Eight percent of Albertans, over 15 years of age (145,000 residents), or 37% of wildlife tourists indicate wildlife study as an activity on outings.

In general, Albertans believe that it is important to maintain abundant wildlife populations. Over 53% of Albertans surveyed indicated that this was very important, while another 34% said it was fairly important (Canadian National Survey Data, 1989). Many people other than those who are wildlife tourists believe in the importance of maintaining abundant wildlife populations. Both users and non-users place a high value on wildlife. "Non-use" values considerably increase the economic value of wildlife beyond the "user-pay" economic values presented in Section 2.2. Public investment decisions need to consider both use and non-use values.

2.1.3 Comparison of United States and Canadian National Wildlife Surveys

This section compares U.S. and Canadian participation in wildlife-related activity and, in particular, primary nonconsumptive trips or outings. Unless stated otherwise, the data referenced in this section is from the 1985 National U.S. Survey

(U.S. Department of the Interior, Fish and Wildlife Service, 1988) and 1987 Canadian survey.

Participation in all wildlife activities appeared to be higher in Canada than in the United States. In Canada, 91% of the survey population participated in some type of wildlife-related activity, versus 77% in the U.S. The U.S. study, however, did not consider indirect activities such as watching wildlife television programs or reading wildlife-related publications.

Participation in primary nonconsumptive activity was also higher in Canada (22%) than in the U.S. (16%) and apparently growing faster. Canadian participation grew from 19.4% in 1981, while U.S. participation fell from 17% in 1980.

The demographic profiles of participants in nonconsumptive activity are similar for both countries. In both Canada and the U.S., males tended to participate slightly more than females, although not significantly. In Canada, 52.0% of participants were male versus 49.0% of the population, and in the U.S., 49% of participants were male versus 47% of the population.

Younger adults in both countries showed the greatest tendency to participate. In Canada, 61% of participants were between 20 and 44 years of age. This group comprised 53% of the population. In the U.S., 41% of the population were between 25 and 44 years of age, and 56% of the participants were in this age group.

With regard to education, in both countries those with more education tended to participate more than those with less education. This relationship was more pronounced in the U.S., where 53% of the participants had some college education, while only 36% of the survey population had any college education.

Consistent with this, the relationship between income and participation in the U.S. was also more pronounced. In Canada,

20.6% of the survey population and 24.4% of the participants in primary nonconsumptive wildlife trips had personal incomes of over $30,000. In the U.S., 34% of the population and 43% of the participants had household incomes in excess of $30,000.

In both countries, those living in the west tended to participate more than the rest of the country. While 27% of the population live in the western U.S., 32% of participants come from this area. Similarly, in Canada, 25.1% of British Columbians and 22.3% of Albertans participate in primary nonconsumptive wildlife activity, versus 22% for Canada. It is possible that the higher participation rates in the west are partly attributable to the fact that the cities are smaller, the population density is lower, and there are more open spaces and consequently more wildlife viewing opportunities.

The higher participation rates demonstrate that some of the best U.S. markets are found in the states relatively close to Alberta. Because of the shorter travel distances, time, costs and general familiarity with our environment, these states may be some of the best markets to target for non-resident wildlife viewing tourism in Alberta. Large Eastern U.S. cities should not be ignored, however, because of their larger population base and potentially large numbers of participants.

A British Columbia market analysis suggests there are about 40 million Americans whose leisure styles, income and education make them potential adventure trip candidates. Two areas of the U.S. that show the greatest potential for adventure travel are the west coast urban centres of California, Arizona, Texas, and Oregon and selected eastern urban centres such as Washington, D.C., New York, Philadelphia and Baltimore (Tourism Research Group, 1988).

In both countries, the most popular nonconsumptive activity is watching wildlife. Canadians rated photography second, studying third, and feeding fourth. In the U.S. feeding was second and

photography was third. The significant difference is that Americans are less interested in photography than Canadians, but more interested in feeding wildlife, primarily birds. When sites and products for non-resident tourists are planned, this difference should be considered. This is particularly important in regard to feeding wildlife. Interpretive and instructional materials should be available that describe why not to feed or, if feeding of certain species is acceptable, how, what and when to feed.

2.1.4 United States Wildlife Viewing Research

The American literature was reviewed to identify the nature of nonconsumptive markets and of existing wildlife viewing programs (Alaska Department of Fish and Game, 1983; Ebeling et al., 1987; Fazio et al., 1977; Florida Game and Freshwater Fish Commission, 1987; Graham, 1979; Kellert, 1980; Kruckenberg, 1988; Lathart and Barnes, 1978; Lyons, 1982; More, 1979; Moss, 1984; Petchenik and Moyer, 1989; Shaw, 1985; Snyder and George, 1981; U.S. Department of Agriculture, 1989; U.S. Department of the Interior, 1983; U.S. Fish and Wildlife Service, 1977, 1982, 1987).

All studies identified an increasing demand for nonconsumptive wildlife uses in the population as a whole and as a proportion of total recreational use experienced in a given area (More, 1979). The 1985 National Survey of Hunting, Fishing and Associated Wildlife-Related Recreation (U.S. Fish and Wildlife Service, 1987) found that one in every two adult Americans participated in some form of nonconsumptive wildlife activity. Participants represented a wide range of age, education, and income groups and did not appear to reflect special interests of narrow segments of society.

Kellert (1980) identified a typology of attitudes towards wildlife that included nine basic categories labelled as naturalistic, ecologistic, humanistic, moralistic, scientistic, aesthetic, utilitarian (Table 5). Differences in attitude vary significantly between age groups, particularly young and old, between men and

Table 5

Attitudes Toward Animals

Naturalistic	Primary interest and affection for wildlife and the outdoors.
Ecologistic	Primary concern for the environment as a system, for interrelationships between wildlife species and natural habitats.
Humanistic	Primary interest and strong affection for individual animals, principally pets.
Moralistic	Primary concern for the right and wrong treatment of animals, with strong opposition to exploitation or cruelty towards animals.
Scientistic	Primary interest in the physical attributes and biological functioning of animals.
Aesthetic	Primary interest in the artistic and symbolic characteristics of animals.
Utilitarian	Primary concern for the practical and material value of animals or the animal's habitat.
Dominionistic	Primary interest in the mastery and control of animals typically in sporting situations.
Negativistic	Primary orientation an active avoidance of animals due to indifference, dislike or fear.

Source: S. Kellert, 1980.

women, and by occupation. Generally, the public's attitude towards wildlife is humanistic, i.e., concerned about individual animals, and moralistic, i.e., concerned about right and wrong treatment. Wildlife managers' attitudes are ecologistic, scientific, and utilitarian. Knowledge of these attitudes, and the differences in attitudes among groups, is useful in planning for wildlife viewing activities. The educational challenge lies in broadening public concern from right and wrong treatment of individual animals to appropriate treatment of wildlife populations and wildlife

habitats. Careful planning of wildlife viewing products can be used to help achieve this objective.

A number of studies (Ebeling et al., 1987; Florida Game and Freshwater Fish Commission, 1987; Moss, 1984; Alaska Department of Fish and Game, 1983) identified the potential for wildlife viewing impacts associated with large numbers of viewing public. These studies concluded that viewing activities will need to be managed to ensure wildlife conservation in ways similar to the management of wildlife populations for hunting.

A study of Wisconsin's wildlife constituency (Petchenik and Moyer, 1989) identified three important management implications: (1) nonconsumptive users are interested in the same wildlife for recreation as consumptive users; (2) game animals such as deer are nonconsumptive users' favorite wildlife; and (3) user participation and public support can be increased by educating the public on what they can do at specific locations within short distances from their homes because time is a key factor in limiting participating.

Wyoming's highly successful nonconsumptive use program, which is experiencing a 5% annual increase by users, concluded that traditional constituencies and traditional funding sources are currently inadequate to develop programs for nonconsumptive users. Needs are to expand and aggressively pursue new and innovative approaches to attract political and fiscal support (Kruckenberg, 1988).

All of the American literature reviewed identified an increasing interest by the American public in wildlife viewing activities. Wildlife viewing was predicted as an activity that would continue to grow rapidly in association with an increasing demand for products. Many American states have implemented wildlife viewing programs or are developing programs. Most often, states with formally established wildlife viewing programs have undertaken user surveys to determine the characteristics and preferred activities

of users. Generally, the greatest percentage of viewers participate in both consumptive (hunting and fishing) and nonconsumptive activities; however, viewers who participate in purely nonconsumptive activities are growing rapidly in size and in some states, notably California, outnumber users who participate in both activities.

2.2 Economic Benefits

In 1987, Canadians spent $5.1 billion on wildlife-related activities, up 21% from 1981 when $4.2 billion was spent. Almost 44% of the $5.1 billion was related to primary nonconsumptive wildlife-related trips or outings, and 21% was related to hunting. The remaining 35% was accounted for by other wildlife-related activities (Table 6).

In 1981 the economic impact of this expenditure was estimated at $8.8 billion in gross business production, 185,000 jobs and $1.9 billion in government revenue from taxation (Demand for Wildlife to 2001).

While in both 1981 and 1987 over 90% of Canadians participated in some type of wildlife activity, it is important to note that it was a small group of wildlife enthusiasts who accounted for a large part of these expenditures. In 1981, the 17% of Canadians that participated in four or five wildlife-related activities accounted for about 66% of the $4.2 billion spent. Furthermore, in the same year an even smaller group, hunters (9.5% of Canadians), accounted for 45% of all money spent on wildlife-related activities. The significance of wildlife enthusiasts' expenditures is also illustrated by comparing average yearly expenditures of the two groups. In 1981, those who participated in one activity spent an average of $151 a year on wildlife-related activities compared to $2,253 for those who participated in five activities (Filion et al., 1988).

Table 6

Total and Average Expenditures by Participants in Wildlife-Related Activities in 1987*

Wildlife-Related Activity	Total Expenditures (Millions)	Average Expenditure
Nonconsumptive trips or outings	$2,232.5	$ 507
Maintaining, improving or purchasing natural areas	1,290.8**	1,967**
All game hunting	1,060.3	630
Residential activity	324.9	23
Incidental wildlife encounters during other trips or outings	117.2	13
Wildlife organizations	73.5	54
	$5,099.2	

* Population 15 years of age and older.
** The sampling variability of these estimates is slightly higher than that for other activities for such reasons as small sample size or low participation.

Source: Canadian National Survey Data.

Table 7 shows estimates of consumer surplus for a number of wildlife-related activities. Consumer surplus is the difference between the total satisfaction a consumer obtains from a good or service (i.e., the maximum price he or she would be willing to pay) and the actual price the consumer pays.

Theoretically, in 1981 Canadians in aggregate would have been willing to spend an additional $779 million for the wildlife-related activities they participated in (Jacquemot et al., 1986).

Table 7

Expenditures and Consumer Surplus by Wildlife-Related Activity for Canada in 1981 Dollars

Wildlife-Related Activity	Actual Participants' Expenditures	Consumer Surplus or Direct Benefits
Recreational Hunting	$1,185,477,930	$418,007,799
Waterfowl	229,614,316	89,587,237
Other birds	284,024,110	90,073,205
Small mammals	199,337,450	74,606,288
Large mammals	472,502,054	163,741,070
Primary Nonconsumptive Trips	2,085,374,379	360,965,740
Other Wildlife Activities*	918,729,183	N/A
Total	4,189,581,492	778,973,539

* Includes wildlife activities around residence or cottage, maintenance and improvement of natural areas for wildlife, membership fees or donations to wildlife-related organizations and incidental wildlife encounters during trips.

Source: Jacquemot et al., 1986.

2.2.1 Primary Nonconsumptive Wildlife-Related Trips or Outings

Table 8 presents data on expenditures for primary nonconsumptive wildlife-related trips for residents of Canada and the western provinces in 1981 and 1987. Albertans (1987, $771/year) and residents of neighboring provinces (1987, B.C.: $586/year; Saskatchewan: $579/year) spent, on average, more than other Canadians (1987, $507/year). It is interesting to note, however, that average expenditures for Canada and all three western provinces have decreased considerably, with the national yearly average declining 13.9% from $589 in 1981 to $507 in 1987. This is based on a comparison of current dollars. On the basis of adjusted dollars, the decrease is approximately 36%.

Table 8

Average Expenditures per Participant* for Primary Nonconsumptive Wildlife-Related Trips or Outings in 1981 and 1987

Residence	1981 Dollars		1987 Dollars	
	Avg. Daily Expenditure	Avg. Yearly Expenditure	Avg. Daily Expenditure	Avg. Yearly Expenditure
Canada (national average)	$37	$589	$30	$507
Alberta	$43	$863	$37	$771
Saskatchewan	$45	$715	$36**	$579**
British Columbia	$55	$997	$31	$586

* 15 years of age and older.
** The sampling variability of these estimates is slightly higher than that for other provinces for such reasons as small sample size or low participation.

Source: Filion et al., 1988.

Table 9 illustrates, by category of expenditure, the money spent on primary nonconsumptive wildlife activities in 1981 and 1987. Consistent with the increased popularity of primary nonconsumptive wildlife activities and increases in population, total expenditure has increased by $100 million from $2.1 billion in 1981. Expenditures on all categories except equipment have increased markedly. Equipment expenditures, which accounted for $1,106.7 million or 52.7% of total expenditure in 1981, decreased to $860.2 million or 39.1% by 1987. Expenditures on equipment may have decreased because they are largely durable products, thereby representing one-time purchases, and also because the recession in 1981-82 resulted in more expenditure caution for "luxury" products. This explains why average expenditures in Table 8 have decreased.

Table 9

Money Spent by Canadians on Primary Nonconsumptive Wildlife-Related Trips or Outings in 1981 and 1987*

Category	1981 Dollars		1987 Dollars	
	$ (Millions)	Percent	$ (Millions)	Percent
Equipment	$1,106.7	52.7	$ 860.2	39.1
Transportation	$ 441.0	21.0	$ 598.4	27.2
Food	$ 264.6	12.6	$ 341.0	15.5
Accommodation	$ 170.1	8.1	$ 250.8	11.4
Other items	$ 117.6	5.6	$ 149.6	6.8
	$2,100.0		$2,200.0	

* Population 15 years of age and older.

Source: Filion et al., 1988.

One area of nonconsumptive wildlife activity which has received specific attention is bird watching. In 1981, Canadians spent $964 million on primary nonconsumptive trips or outings related specifically to viewing birds and a further $52 million on incidental bird watching (Coopers and Lybrand, 1989). Although more recent data is not available, bird watching in the early eighties was the fastest growing wildlife recreation activity in North America. Total bird watching expenditures are now estimated in excess of $1,100 million.

2.2.2 Hunting

Table 10 presents data on wildlife expenditures for hunting by residents of Canada and the western provinces in 1981 and 1987. Albertans (1987, $683/year) and British Columbians (1987, $861/year) clearly spend on average considerably more than other Canadians. As noted for consumptive activities, average yearly

Table 10

Average Expenditures per Participant* for Hunting Wildlife in 1981 and 1987

Residence	1981 Dollars		1987 Dollars	
	Avg. Daily Expenditure	Avg. Yearly Expenditure	Avg. Daily Expenditure	Avg. Yearly Expenditure
Canada (national average)	$37	$662	$37	$630
Alberta	$71	$1099	$45	$683
Saskatchewan	$32	$508	$40	$522
British Columbia	$77	$1245	$50	$861

* 15 years of age and older.

Source: Filion et al., 1988.

hunting expenditures have decreased in Canada, Alberta and British Columbia. Alberta's expenditures decreased the most, with average daily expenditures in current dollars declining 37% from $71 in 1981, and average yearly expenditures by 38% from $1,099 in 1981.

Table 11 illustrates, by category of expenditure, money spent on hunting wildlife in 1987. Equipment and transportation are the most significant areas of expenditure, accounting for about 65% of total hunting-related expenditure.

2.2.3 Alberta

In 1981, Albertans spent $549.8 million on all wildlife-related recreational activities. About 51% of this, or $281.2 million, was spent on primary nonconsumptive trips or outings, $203.4 million on recreational hunting and the remaining $64 million on other nonconsumptive activities.

Table 11

Money Spent on Hunting Wildlife by Canadians in 1987*

Category	Dollars (Millions)	Percent
Equipment	434.5	39.5
Transportation	279.4	25.4
Food	140.8	12.8
Accommodation	61.6	5.6
Other items	183.7	16.7
	$1,100	100

* Population 15 years of age and older.

Source: Filion et al., 1988.

In 1987, Albertans spent $305.4 million on primary nonconsumptive wildlife-related trips or outings. This is an 8.6% increase over 1981's figure. As was the case with the national figures, in current dollars most expenditure categories increased considerably more than 8.6%, with a considerable decrease in equipment expenditures keeping the total increase to within 8.6% (Table 12).

Wildlife-related expenditures in Alberta at over one-half of one billion dollars per year provide a significant contribution to the provincial economy. With proper management of the resource, development of opportunities and marketing, there is a large potential for significantly increasing this contribution.

2.3 Wildlife Viewing and Tourism Interview Results

A variety of agencies and individuals with experience in the development and execution of wildlife viewing programs and products were contacted. A questionnaire was developed and used to survey respondents about the the nature of their programs, program

Table 12

Money Albertans* Spent by Specific Category on Primary Nonconsumptive Wildlife-Related Trips or Outings in 1981 and 1987

	1981		1987	
Category	$ (Millions)	Percent	$ (Millions)	Percent
Equipment	161.4	57.4	141.7	46.4
Transportation	53.8	19.1	75.9	24.8
Food	33.7	12.0	43.1	14.1
Accommodation	19.4	6.9	28.9	9.4
Other items	12.9	4.6	15.8	5.2
	281.2	100	305.4	100

* 15 years of age and older.

Source: Canadian National Survey Data.

delivery and marketing approaches, and to collect information on user profiles. Appendix C provides a detailed summary of the questionnaire results and includes a copy of the questionnaire. Appendix E provides a list of agencies and individuals contacted.

Thirty-four interviews were conducted including seven with Canadian provincial governments and six with American jurisdictions. In Canada, the provinces of British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, and the Yukon and Northwest Territories were contacted and in the United States the states of Washington, Oregon, California, Montana, Wyoming, and Colorado. A number of non-government organizations (NGO's), private operators, academics, and civic organizations were also surveyed.

2.3.1 Canadian Provincial Governments

Program Organization and Delivery

Two of the six Canadian provinces surveyed, British Columbia and Alberta, have established formal wildlife viewing programs. Another two jurisdictions, Manitoba and the Yukon Territory, are developing strategic plans to provide wildlife-related viewing opportunities. Ontario has a Non-Game Program to which monies are committed annually. In the Northwest Territories non-game tourism and viewing opportunities are actively promoted by the government, in conjunction with private sector operators. In Saskatchewan, there is substantial interest in programming for nonconsumptive wildlife-related activities; however, a formal program has yet to be established.

British Columbia

The Wildlife Branch of British Columbia's Ministry of the Environment, in conjunction with an interagency committee of other government departments and NGO's, helped to develop the province's wildlife viewing program which has an operating budget of $1.7 million to be spent over five years. The program was formally launched in April 1989 and has an annual operating budget of $344,000. Its objectives are to (1) promote an understanding and appreciation of B.C.'s wildlife; (2) encourage the growth of wildlife tourism; and (3) establish special wildlife viewing areas.

The program has identified approximately 300 wildlife viewing sites. Twenty wildlife viewing plans are under development with the first viewing site scheduled to open in 1990. No admission will be charged to viewing areas.

A marketing study is currently underway to identify user profiles; as well, a trend analysis is being conducted over five years to

determine how people become aware of the viewing program. A sum of $40,000 annually is allocated for marketing purposes. In addition, B.C.'s Ministry of Tourism is conducting a $50,000 study to inform wildlife tour groups and operators of the potential for wildlife tourism in the province. Wildlife viewing opportunities will also be promoted through publications, brochures, and other agency programs.

Manitoba

Manitoba's Department of Natural Resources and Tourism, Wildlife and Parks Branch, launched its Wildlife Viewability Project in October 1988. This project is modelled on British Columbia's Wildlife Viewing Program and has a budget of $50,000. Funds are contributed by three agencies: Manitoba Parks ($10,000), Tourism ($30,000) and Wildlife Branch ($10,000). A committee of six people, two representatives each from Parks, Tourism, and the Wildlife Branch, are responsible for the project. The program has hired a consultant to identify potential wildlife viewing sites and to assess the market feasibility of developing these sites.

Alberta

The Alberta Fish and Wildlife Division, has developed a strategic plan for the delivery of a Watchable Wildlife Program. This program is designed to promote and enhance public enjoyment and appreciation of the province's wildlife resource through the provision of nonconsumptive recreation opportunities and public information related to wildlife viewing.

Current and planned activities include the development of wildlife viewing guides and brochures, wildlife-oriented magazines, viewing sites and interpretive facility development. Planned for completion and distribution in April 1990 is a guide entitled "Alberta Wildlife Viewing Guide." The book will be a high-quality, full-colour guide to over 60 provincial wildlife viewing

locations. It will provide one-page descriptions of each site that explain how to reach the site and the viewable wildlife species expected to be in the site vicinity. Information will also be provided on how to view and photograph wildlife plus proper viewing etiquette.

Also planned for completion and distribution in 1990 is the publication "Director of References for Alberta's Watchable Wildlife." This 40-page guide provides an annotated list of available publications with information on Alberta's watchable wildlife. It includes such things as regional and local checklists, listings of viewing guides, general references, and where the available material can be located or purchased. This publication is distributed free of charge.

The Watchable Wildlife Program is encouraging the development of well-thought-out linkages with other government departments as a means of capitalizing on related programs and of effectively using available manpower and resources. Linkages with the Education Services Program, Extension Services Section, are foreseen to provide educational material on watchable wildlife for school curricula, as well as linkages with the Natural and Protected Areas Program, Buck for Wildlife Program, Project Wild, and the Departments of Recreation and Parks and Alberta Tourism.

Yukon Territory

No formal wildlife viewing program has been established in the Yukon Territory; however, a Wildlife Viewing Strategy is being prepared by the Fish and Wildlife Branch of the Department of Renewable Resources. Completion is expected by February 1990. The strategy proposes four interpretive themes to communicate the important features of wildlife in the Yukon. These are:

. wildlife in a wilderness setting
. wildlife in spiritual life, legends and art
. wildlife and man co-existing in nature
. wildlife migrations

Marketing images and messages will be consistent with the possibility of seeing wildlife. Cautious marketing of sensitive wildlife species is intended to allow time for monitoring environmental impacts associated with increased viewing activities. Existing publications including the Yukon Vacation and Highway Guide will be used to promote the program. This information will be available at all public visitor information centers and at border crossings. Future developments include the publication of specialized road maps and viewing guides.

Ontario

The Wildlife Branch of the Ministry of Natural Resources (MNR) has a Non-Game Program budget of $250,000 to which the province's regions apply for funding of their specific non-game programs. These programs include endangered species status reports, development of interpretive programs and display materials, conservation management plans, and installation of viewing platforms. Central Region is developing a viewing guide in conjunction with the Federation of Ontario Naturalists. No deliberate marketing is planned although news releases will be used to announce program initiatives and outdoor writers will be encouraged to publish pertinent articles.

Northwest Territories

In the Northwest Territories, the Department of Economic Development and Tourism (EDT) is responsible for promoting non-game tourism and viewing opportunities, in conjunction with various tour operators. Marketing products are developed by a Toronto marketing firm to provide an overall consistent image of nonconsumptive

opportunities. Individual operators are given the opportunity to advertise in government material for an appropriate fee. Promotional material is made available on request by the department and is available at government tourism offices.

All tour operators are licensed by EDT. The Department of Renewable Resources is not presently involved in licensing operators, but future involvement is likely in regard to regulation of access and mitigation of potential conflicts between consumptive and nonconsumptive users.

Saskatchewan

Although a formal wildlife viewing program has not been established in Saskatchewan, the Department of Parks and Renewable Resources perceives there is a market for wildlife viewing activities. It has considered the potential for private sector involvement, in part to be supported by Saskatchewan Tourism with technical advice provided by Parks and Renewable Resources.

User Profiles

Of the Canadian agencies surveyed only two, British Columbia and the Yukon Territory, have undertaken formal user profile surveys. Results of the B.C. survey have yet to be compiled. The Yukon survey was conducted by the Department of Tourism as a visitor exit survey. Survey results show that most non-residents involved in wildlife-related viewing activities were either from Alaska, central Canada, or the eastern U.S. Users' ages range from young children to retired adults. Most users were somewhat informed and viewed wildlife from their cars or from special viewing areas.

Although no formal survey has been conducted in the NWT, information suggests that most users are non-resident, primarily Europeans, who are well informed and who participate in a wide

range of acitivities. In contrast, in Ontario, information suggests that most users of Non-Game Program products are residents.

Private Sector Involvement

Almost all provinces and particularly the Northwest Territories are encouraging private sector operators to become involved in providing wildlife viewing opportunites. In British Columbia, there is growing recognition among guides and outfitters of increasing public involvement in nonconsumptive viewing activities. Ten percent ($2 million) of the revenue generated by guides and outfitters in 1988 came from non-hunting revenue. Currently, 11 guides and outfitters offer wildlife viewing experiences; in addition, approximately 24 adventure travel companies offer wildlife viewing tours. It is anticipated that this number will increase by 20-30% over the next several years.

In Alberta, a small number of guides and outfitters are beginning to develop packages that provide wildlife viewing opportunites. The Manitoba government is promoting wildlife viewing opportunites through active support of private tour operators, of which there are ten. In the Yukon, 15 adventure tour operators provide a variety of outdoor experiences which also include the opportunity for wildlife viewing. In the Northwest Territories, there are many private operators who provide a wide range of products and activites which include adventure touring throughout the year and wildlife viewing opportunities in the spring and summer.

Barriers to Wildlife Viewing

Two principal barriers were identified to wildlife viewing: lack of public knowledge about viewing opportunities; and absence of agency support in providing viewing opportunities. A limited public land base was also identified as a barrier in Saskatchewan and Ontario. In Ontario, lack of recognition by Ontario Tourism of

the tourism potential for wildlife viewing was also identified as significant.

2.3.2 American State Governments

Program Organization and Delivery

Five of the six American states surveyed, Washington, Oregon, California, Wyoming, and Colorado, have recently established Wildlife Viewing Programs, and a viewing program is presently planned for Montana. All of the wildlife viewing programs are operated and funded by government. Most have been developed exclusively by Fish and Game Departments, with the exceptions of Oregon and Montana. These states were aided by the Defenders of Wildlife and, in the case of the latter, the U.S. Forest Service and Audubon Society.

Washington

Washington's Watchable Wildlife Program was established in the latter half of 1989. Current funding is through the Department of Wildlife's Office of Information and Education. Additional funding is anticipated from the state legislature to secure specific wildlife viewing sites. To date, only a few sites have been developed, including the Yakima elk viewing area and the Nisqually Reach intertidal site. The program is marketed through agency brochures and publications and relies on a core of retired senior volunteers to staff the Yakima site.

Oregon

Oregon's Watchable Wildlife Program was established in 1985 as part of a long-range department planning process. Limited funds from the sale of hunting and fishing licenses were initially augmented by Wildlife Heritage Foundation dollars to establish the first few wildlife viewing sites. In 1988, in conjunction with the Defenders

of Wildlife, the Oregon Wildlife Viewing Guide was produced. This guide identifies 123 state wildlife viewing sites. Alternative funding mechanisms are being actively pursued, including use of the interest generated by the Oregon Plastics Excise Tax, as a means of generating long-term monies for the Watchable Wildlife Program.

Present marketing efforts are focused within the state through the use of agency publications, brochures, and sale of the viewing guide.

California

The California Wildlands Program began operation in March 1989. Presently, there are nine wildlife viewing areas in the state. At each site, one naturalist provides guided tours. Viewing facilities and self-guided tours are intended for future development. The program has a staff of 16 and an annual operating budget, including salaries, of $2 million. The program is revenue based with funds raised through day-use fees at wildlife viewing areas. Initial monies to help establish the program were borrowed from a variety of wildlife conservation funds. User-derived revenues totaled $100,000 in 1989, far less than expected and than the needed $2 million.

The program is marketed in-state through public service announcements, newsletters to NGO's, television advertisements, and by a special magazine. No advertising is done outside the state. The program is looking to develop new marketing approaches through the services of a marketing agency.

Montana

Montana's wildlife viewing program is being planned by the Fish, Wildlife and Parks Department, in conjunction with the U.S. Forest Service, Defenders of Wildlife, and Audubon Society. Department funds are available for the program, but monies will also be

generated through non-game tax check offs. A wildlife viewing guide, identifying 100 sites, is in preparation. The guide will be marketed through the department for a nominal fee of six dollars.

Wyoming

The Wyoming Game and Fish Department (WGFD) has an active nonconsumptive use program which is incorporated into the Department's planned game and fish management system. The nonconsumptive use portion of the plan became operational in January 1987.

The nonconsumptive program's logo, Wyoming's Wildlife - Worth the Watching, has been registered with the U.S. Department of Commerce Patent and Trademark Office. It is the cornerstone of an aggressive marketing campaign to encourage both non-residents and residents to participate in nonconsumptive activities. The operating budget of the program has grown from $150,000 in 1987 to $700,000 in 1989. It is staffed by the equivalent of two-and-a-half man years annually.

The objectives of the program are to increase active nonconsumptive user participation to a minimum of 238,000 residents and 4.1 million non-residents by 1991. Achievement of these objectives will increase the total annual recreation days provided by nonconsumptive use of wildlife to 2.08 million for residents and 30.7 million for non-residents. If the existing per-day expenditure rates are maintained, these recreation days will result in annual expenditures of $48.5 million and $1.02 billion, respectively, by 1991. No changes in existing wildlife population objectives will be required to meet nonconsumptive use objectives, and there will be no reduction in emphasis of traditional constituencies and their interests.

The program uses a multi-disciplinary approach consisting of information, education, assistance, and acquisition elements to

realize the programs objectives. Initial marketing efforts included news releases, talk shows, slide presentations, meeting attendance, magazine and tabloid features, internally produced radio programs and television news segments, and development of program products. Long-term projects will include general and site-specific brochures, books, statewide signing integrated into the state's network of rest areas and roadside stops, displays at travel information centers, and outdoor billboard advertising.

Colorado

Colorado's Watchable Wildlife Program was formally established in July 1987. Long-range plans for the program were developed as early as 1970 as part of the state's Non-Game Program. The current program is funded through the Department of Fish and Game's annual budget. It presently accounts for two percent of the Department's total budget. The cost of the Watchable Wildlife Program is approximately $750,000 annually. One full-time staff person has been allocated to the program with an annual operating budget of $100,000. The remaining monies are assigned to part-time staff responsibilities and administrative costs.

Current viewing opportunities are from motor vehicles. Development of 25 formal viewing sites is underway to include, at some locations, the construction of interpretive facilities. No charge is planned for these viewing sites. However, charges at high-use sites are being considered to cover operation costs. Charges will be for the the use of spotting scopes and other similar equipment.

User Profiles

User profiles have been conducted by Washington and Oregon State. California has not conducted its own survey, relying instead on a recent state-wide questionnaire conducted by the California State University Survey Research Center. Wyoming uses information collected by the Wyoming Travel Commission and the 1985 National

Survey of Hunting, Fishing and Wildlife-Associated Recreation, as does Colorado. Montana has not yet conducted a user profile survey.

Survey results for Washington, Oregon, and California reveal that most users are residents, of no specific age, who use state facilities throughout the year. Most viewing is from cars or special viewing areas. Some users participate in organized tours of key areas. Per capita expenditures are estimated at less than $25 in Oregon.

In Wyoming, approximately 190,000 residents and 3,270,000 to 5,088,000 non-residents actively participate in nonconsumptive wildlife activities. Total expenditures by this group are at least $678 million, including $24 million by residents and $654 by non-residents.

Approximately 28% of Colorado residents are active watchers of wildlife. Watchable wildlife recreational activities are estimated to be worth approximately $425 million annually. Approximately 18 million tourists visit Colorado each year, of which 15-20 percent come to National Parks to view wildlife. Survey figures have yet to be collected, however, for non-resident involvement in wildlife recreational activities. Discussions are currently underway with Colorado's Department of Tourism to extend their surveys to identify money spent by non-residents on wildlife-related activities.

Private Sector Involvement

Private sector involvement in wildlife viewing activities is not actively supported by state agencies in Washington, Oregon, California or Montana, although a number of private sector tours operate in these states. Wyoming, however, actively encourages private sector operators and provides promotional support.

Colorado provides some support to the less than 10 private sector operators with businesses in the state.

Barriers to wildlife viewing in the United States were similar to those in Canada. In Oregon, the major barrier is general lack of public awareness about existing wildlife viewing sites. In Washington and California, barriers include difficulty in securing government funds for viewing programs, and in California, difficulty in freeing funds to hire consultants to assist with marketing. In Montana, the major barrier is lack of public interest. This is attributed to the many wildlife viewing opportunities that already exist and that make it difficult to garner public interest for sites identified in the viewing guide. The substantial distances involved in reaching identified sites are also identified as barriers.

2.3.3 Non-Government Organizations

All of the non-government organizations interviewed predicted steady to rapid growth in wildlife viewing activities over the next several years. The Nature Conservancy of Canada is beginning to operate conservancy Lands across Canada to allow for wildlife viewing and nature appreciation by the general public. The Canadian Nature Federation has a program of national nature viewpoints for which criteria are currently being developed. Beaverhill Lake in Alberta has been officially designated as a national nature viewpoint. Although Ducks Unlimited does not have an active viewing program, many of DU's larger projects have an interpretive component. Increasing public interest in wetlands and viewing wetland birds has led DU to include an interpretive center in the design of the new Canadian head office located at Oak Hammock Marsh, in Manitoba. Regional efforts by DU's Brooks area office include the development and distribution of guided tour information to the waterfowl of the Brooks area and DU-managed wetlands.

Non-government organizations identified a number of barriers to involvement by the private sector. These included lack of agency support for private sector involvement, a perceived need for more effective wildlife management and protection, and a guarantee of resource maintenance. Publication of the "Status of the Fish and Wildlife Resource in Alberta" was recommended to help guide private operators in identifying suitable wildlife species to be included as part of tour packages.

2.3.4 Others

Private sector operators stressed the importance of government in helping to direct and assist in marketing for private operators providing wildlife viewing packages. Private sector operations suffer from Albertans' lack of awareness of provincial viewing opportunities. Government initiative to convince Albertans of the diversity of wildlife viewing opportunities was recommended because not only is the viewing public unaware, but also potential operators are not aware of the business opportunity. A province-wide marketing campaign to promote wildlife viewing opportunities was recommended to include brochures, a viewing guide, magazine articles, and radio and television coverage. Education of school-aged children was also stressed.

2.4 Discussion Group Sessions

Five discussion group sessions were held throughout the province. Three of these were conducted with the public in Bonnyville, Calgary, and Lethbridge and the remaining two with wildlife professionals and representatives of non-government organizations in Edmonton.

A questionnaire was circulated at the public group sessions and used as a format to guide the discussions. Participants were urged to complete the questionnaire and return it by mail. An outline of topics for consideration was used to guide the discussions at the

remaining two sessions. A detailed account of the discussion sessions and questionnaire responses is provided in Appendix C.

Many of the suggestions and concerns raised by the public discussion groups, wildlife professionals, and non-government organizations were similar. All three groups stressed the public sector responsibility for maintaining and managing the resource, for coordination among government departments, and for assuming a lead role in encouraging private sector development, especially opportunities for guides and outfitters. Almost all participants were willing to pay user fees, providing that these fees included additional services such as interpretive tours and the provision of educational materials.

2.4.1 Public Discussion Group Sessions

All of the participants spent considerable time in outdoor activities, many of them wildlife related. Activities included hiking, backpacking, camping, canoeing, daily walks and longer day trips to view, photograph, and, in one instance, to paint wildlife. In Bonnyville and Lethbridge, wildlife viewing was often a family activity easily facilitated by the proximity of both towns to a variety of viewing opportunities. Partly because of Calgary's larger size and greater distance from perceived viewing opportunities, not as many individuals participated in family viewing activities. Nonetheless, wildlife viewing often played a major role in the selection of weekend trip destinations. Many Calgary participants took trips which expressly included a wildlife viewing component outside Alberta to such destinations as British Columbia, Alaska and the United States.

Most participants expressed a preference for viewing large mammals and birds. Interest was also expressed in butterflies, reptiles, amphibians, and small mammals. Not only were wildlife species important, but also wildflowers, shrubs and trees. Many

participants stressed that they enjoyed not only viewing wildlife but also time spent learning about wildlife habitat and general appreciation of nature.

Almost all participants developed an appreciation for nature and viewing wildlife when young through either family or school activities. Many participants, initially with parents and subsequently on their own, developed an appreciation for wildlife and wildlife habitats through growing up in rural environments and hunting experiences. Some participants, notably urban dwellers, developed an interest in wildlife viewing as adults through the encouragement of others or exposure to wildlife-related television programming and magazine articles. People continue to participate because of personal enjoyment, either aesthetic or spiritual, the opportunity to relax and learn in an outdoor setting, and often because of companionship.

Although available time was a significant factor in determining participation, all participants expressed a strong interest in more wildlife-related viewing opportunities. Enabling factors were primarily greater provision of opportunities and services by government and to some extent the private sector. Identified products and packages included the development of nature and interpretive centres; the provision for more remote experiences; an improved infrastructure of campsites, cabins, trails, bike paths, and guided tours; development of a provincially available information system of opportunities and events to include information on existing sites; improved environmental education programming in schools and adult education opportunities; access to leased land and right-of-ways such as fences and abandoned or seldom used rail lines; and development and encouragement of greater private sector opportunities.

Roles for the public and private sector and NGO's were identified. Participants argued that government must assume the principal responsibility for provision and marketing of wildlife viewing

opportunities, for resource protection and management of wildlife populations and essential components of the habitat base, and for leadership in developing a conservation ethic.

Some participants expressed concern about private sector exploitation of the resource. Some felt government has the responsibility for regulating the private sector and for ensuring that operators provide good viewing products. Private sector potential involvement includes such things as the provision of a variety of complementary secondary or unique services and unique viewing products.

Non-government organizations could also become involved in providing viewing opportunities that would complement government programs and private sector operations. These organizations could, for example, raise monies to provide infrastructure facilities such as trails and platforms at viewing sites, as well as assisting in guiding, interpretation of viewing opportunities, and possibly running site concessions. Through their membership, NGO's could foster knowledge about viewing opportunities and assist with fundraising to help cover capital and operating costs of viewing sites.

Most participants agreed with a user-pay concept and were willing to pay entrance fees, particularly if guided tours or educational material were available. The sale of conservation passes, books for a wildlife stamp program, and revenues from gift shop purchases were all acceptable. They expressed a strong desire, however, that funds collected be specifically designated to viewing opportunities rather than to general revenue.

2.4.2 Wildlife Professionals and Non-Government Organizations

Both of these groups identified the need for a range of viewing sites, outside the National Parks, to include major destination sites and an infrastructure of minor sites. Many areas in Alberta

have the potential for this kind of development, but are either not recognized or underdeveloped. There are many benefits to developing a hierarchy of wildlife-related recreation experiences. An infrastructure of well-developed and less well-developed sites would encourage the development of tour packages that provide participants with a variety of viewing opportunities, while spreading tourism dollars over a large area. This approach would help to alleviate user pressure at major sites. It would also require the development of an infrastructure of services.

By far the greatest prospect for success is the promotion and development of a diversity of sites and opportunities. Wildlife viewing opportunities may best be sold as part of a nature experience, rather than as a distinct package.

Both groups identified the need for collection of primary data on user characteristics and preferences so that resident and non-resident viewing packages that reflect market needs can be developed. Marketing and appropriate packaging of market products are essential to developing awareness and encouraging participation. Important to successful marketing is distribution of product information. It should include the distribution of materials to appropriate government departments and, importantly, to Travel Alberta information locations. Staffing of these locations by well-trained personnel familiar with the opportunities of a specific region is important. Along with this, it is necessary to have a central registry of information related to wildlife viewing opportunities and products.

All participants identified the principal responsibility of the public sector as maintenance and protection of the provincial wildlife habitat base. Land acquisition was identified as essential if representative areas of wildlife habitat are to be secured and maintained. Public sector responsibilities included the coordination and development of a provincial marketing plan,

management and coordination of activities among departments, and encouragement of the private sector.

Many private sector opportunities were identified particularly for guides and outfitters in developing and providing tour packages. Among operators, there is a general unfamiliarity with how to capitalize on opportunities. This group will need help from government and/or private consultants in developing packages and training in how to run a service industry, particularly when providing products for the non-resident market.

Many opportunities also exist for non-government organizations to complement the efforts of the public and private sectors. These organizations could also promote and offer specialized tours using membership staff. Some assistance from government would be beneficial in helping NGO's to initiate and plan tour packages. The Alberta Fish and Game Association, for example, would like to expand its terms of reference to include watchable wildlife and is prepared to work with government in developing suitable programs.

Funding for the development of viewing programs and products was seen as the responsibility of several government departments, with some of the costs to be borne by the public through user fees. Additional fees to purchase hunting and fishing licenses were not recommended, as consumptive users have already borne many of the costs of habitat protection and enhancement. Nonconsumptive users could contribute through user fees, proceeds from the sale of wildlife products such as guides, maps, pins and T-shirts, and even voluntary lock boxes at specific sites (Hvenegaard, 1989).

2.5 Watchable Wildlife Product Characteristics

This section presents some of the factors that should be considered when planning wildlife viewing sites and products in Alberta. It is based on information obtained while doing the market research and reinforces some of the findings presented above.

2.5.1 Resource Concerns

In the discussion groups, interviews and literature review, much interest and concern were expressed about management of the wildlife resource base. The relationship between wildlife and its habitat is best summarized by this statement: "A wildlife viewing product is not an animal or animals in isolation but rather animal(s) in association with an environment and the viewer" (Canada/British Columbia Economic and Regional Development Agreement, 1988). The primary recommendation of this study was that wildlife viewing tourism be developed in a fashion that generates economic benefits while also protecting environmental values.

A considerable amount of time was spent by discussion group participants on the importance of habitat preservation and enhancement. A strong belief by all discussion group participants was that the development of wildlife tourism products, marketing of wildlife tourism, and development of watchable wildlife tourism must be done in an environmentally sensitive manner, if they are to realize their potential and be sustainable economically. This requires more than just development of viewing sites and promotion of opportunities in various markets. More importantly and initially, it requires a commitment by all levels of government to maintenance of the wildlife resource and its habitat base. This, in turn, requires addressing resource base and land use conflicts in a sensitive manner, designating a significant number and size of "natural areas," and developing viewing opportunities that limit negative viewing impacts.

In B.C., guides and outfitters unanimously identified resource development issues as a major concern for their operations. They want a balanced approach to resource use. Some of the resource management issues they face are maintenance of wilderness areas and the "remote" experience in the face of competing land use activities such as logging; protection of wildlife habitat areas;

and wildlife management strategies (Canada/British Columbia Economic and Regional Development Agreement, 1989).

Similar resource management issues were identified as applicable in Alberta. Since the development of wildlife viewing tourism is in its infancy in Alberta, simultaneously addressing these concerns with the development of products and markets will optimize wildlife viewing tourism and the consequent economic benefits to Albertans.

2.5.2 Wildlife Viewing Sites and Opportunities

The survey research data shows that those currently involved in wildlife-related tourism or recreation activities, particularly the domestic market participants, come from all age, income and educational groups and from rural and urban areas. Viewing opportunities should therefore be distributed throughout the province. This is important for several reasons:

- much wildlife viewing is done locally--many dispersed sites will provide easy access for many people;
- diversity of viewing opportunities is important because many viewers prefer a diversity of experiences;
- given the very large existing and potential domestic and non-resident markets, negative impacts can be reduced by dispersing use over a large number of sites; and
- quality viewing products require moderate to low densities of people.

An idea presented at one of the discussion group sessions and generally agreed on was that along with many dispersed sites, there should also be two or three major sites with interpretive centres. This would draw tourists from outside Alberta as well as provide main-site focus for Albertans. Selection of major sites should be

in good viewing areas with relatively limited environmental sensitivity. Suggested site locations include Big Lake near Edmonton; Jesse and Moose Lake near Bonnyville; Beaverhill Lake near Tofield; and Fish Creek Provincial Park in Calgary.

The research, in particular the discussion groups, emphasized the importance of introducing children at an early age to wildlife viewing and general nature appreciation. To this end, the following are suggested:

i) develop wildlife viewing sites that are conducive to family use, particularly since wildlife viewing is often a family activity. Reid et al. (1986) reports that for most activities, over two-thirds of the participation is with family;

ii) develop a program, such as S.T.E.P., to complement resources in schools and provide field experiences at elementary and junior high levels. Nature centres currently provide this role but mostly in urban centres. Also, it was expressed that there are not enough nature centres to do this effectively; and

iii) explore, with the Alberta Fish and Game Association, the potential for developing and implementing a "Watchable Wildlife Program" similar to their hunter training, fishing education and farm school programs.

In planning sites and marketing programs, it needs to be remembered that population growth and aging of the population will influence participation in wildlife-related activities. Through natural increase and immigration, the Canadian population is growing. Data reported in the Market Research Section (2.1) showed that with a modest participation rate increase of approximately 2.5%, total participation increased by approximately 22% in Canada, due to population increase. This will continue to be the case.

Aging will also have a significant impact on wildlife tourism. By the year 2001, it is forecast that more than 4 million Canadians will be over the age of 65, compared to 2.3 million in 1981 (Filion et al., 1988). With an aging population, security and facility of access will become more important criteria for provision of opportunities.

The market research found the study of wildlife to be an important activity component of those on a trip or outing for the primary purpose of viewing, feeding or photographing wildlife. Viewers come not only to watch, but also to learn about animals. Educational services should be developed and be part of wildlife viewing opportunities. The B.C. Viewing Study identifies these as including:

- interpretive centres;
- naturalist guides;
- interpretive brochures; and
- interpretive signs (Canada/British Columbia Economic and Regional Development Agreement, 1988).

Providing sites in close proximity to large urban centres was identified as important by some of the discussion groups. Proximity to the large urban markets, provides ease of access. These sites can also serve to attract and enhance the experience of more distant tourists, as well as provide easily accessed education resources for schools. Sites could include more urban nature centres and development of facilities and supportive infrastructure at locations such as Big Lake (Edmonton) and Fish Creek Park (Calgary).

The British Columbia Viewing Study presents an interesting category of viewing zones that relate to locations, markets, access and infrastructure support (Canada/British Columbia Economic and Regional Development Agreement, 1988). They are:

- Urban zone: In and around major urban communities, does not depend on the provincial land base;

- Frontcountry zone: Excellent access, close to populated areas, good support infrastructure for large numbers of tourists;

- Midcountry zone: In a natural wildland environment where resource activity has created access; and

- Backcountry zone: Areas that are more difficult to access and not substantially altered by human activity.

This zone categorization is presented for information purposes as a potentially useful way of segmenting the markets and categorizing the sites. The watchable wildlife tourism plan presented in Section 3.0 makes reference to zones in an Alberta context.

Site selection for the Alberta viewing guide included the following characteristics:

i) wildlife species characteristics: predictability, abundance, approachability, viewability, sensitivity, popularity, and uniqueness;

ii) viewing site characteristics: secondary features, support facilities and programs, accessibility, site area disposition, and diversity of wildlife; and

iii) wildlife management program compatibility: user compatibility and public relations/education.

In the group discussions and interviews, accessibility was expressed as a major concern. Accessibility means more than roads people use to access a specific location, but also being able to get on the land where the viewing opportunity exists. Land in Alberta falls under various ownership or management categories.

Major ones are Crown land not leased and generally open to the public; Crown leased lands that, depending on current judicial review, may not be available to the public if the leaseholder so chooses; and private lands where access is, or is not, provided at the pleasure of the owner.

Access to land was not a critical concern to residents in Northern Alberta, because there is abundant Crown land in close proximity. However, it is a major concern in Southern Alberta. Suggestions made to increase access included the following:

- have all Crown lands, leased or otherwise, available for public access. This can include regulated use;
- have the provincial government designate more lands in "natural areas";
- have the provincial government purchase lands in prime viewing areas such as river valleys in Southern Alberta;
- have the provincial government underwrite private land owner's insurance so that liability is not a constraint for private land owners when deciding to allow public access; and
- encourage land owners to develop wildlife viewing programs and products on their land for reasonable remuneration.

2.5.3 Preferred Species

The question of preferred species is interesting but difficult to resolve. It appears that there are many more "birders" than viewers of other wildlife. This may be because birders are better organized through clubs and events such as "The Christmas Bird Count" than other kinds of wildlife viewers. It may also be because birds are more abundant and found in most locations and therefore more predictable in terms of probability of viewing.

Bird watching has been described as the fastest growing wildlife recreation activity in North America (Coopers and Lybrand, 1989). Another publication, Golden Door (1989), mentions bird watching as second only to gardening as the fastest-growing pastime: "Eighty million Americans are interested in bird watching, 30 million of whom consider themselves active birders." Birders in North America spend $15 billion per year on birding activities.

Undoubtedly, bird watching opportunities should be a major consideration in the provision of sites and opportunities; however, most wildlife viewing species preference rankings from Canadian and U.S. surveys do not rank birds first.

One ranking from a survey of non-hunting Alberta households presents the following ranking in order of preference (Phillips et al., 1989):

1. ungulates (deer, elk, moose, sheep, etc.)
2. waterfowl (ducks, geese, etc.)
3. small mammals (rabbits, squirrels, etc.)
4. other birds (songbirds, eagles, etc.)
5. upland birds (grouse, ptarmigan, etc.)
6. large carnivores (bears, wolves, etc.)

Another study presents the following ranking (Reid et al., 1986):

1. sea mammals
2. deer, elk, moose
3. songbirds
4. waterfowl
5. other birds
6. endangered species
7. raptors
8. other
9. all wildlife
10. bear
11. wolf, cougar, coyote

12. small mammals
13. mountain goat, mountain sheep, caribou
14. reptiles, amphibians

Although mammals are generally more difficult to view, and therefore more viewers are more active as bird watchers, there is a greater interest in large mammals. Watchable wildlife programs will need to provide a balance that wisely reflects preferences for large mammals with more common birding activities.

2.5.4 Tourist Requirements

It is important to identify the expectations, needs and preferences of viewers when developing and promoting wildlife viewing opportunities. This is particularly important for non-residents who spend relatively large amounts of money to reach Alberta and Alberta residents who travel long distances for a wildlife/adventure tourism experience.

As mentioned previously, photography and wildlife study are important to the domestic market, while feeding and photographing are important to the U.S. market. Tourists will receive better value if the activities they participate in provide for all three activity preferences and/or provide a recognition of them even when they may not be readily possible or probable.

The natural scenery rating of tourists to Alberta is high. In the Travel Alberta (1982) Survey, attributes receiving a good rating included "provides lots of opportunity for photography," and "has unspoiled beauty." American and international tourists rated natural scenery higher than did Canadians. Of the three most important attributes, items related to the natural environment were most often identified as important by foreign visitors. This indicates, particularly with non-resident tourists, that viewing opportunities in natural and scenic settings are valued highly.

Diversity of experience is also important. Many wildlife tourism viewers participate in several activities. The Canadian wildlife surveys show that a small core group of multiple-activity participants accounted for two-thirds of all Canadian wildlife-related expenditures (Filion et al., 1988).

In the B.C. viewing study several products and packages are described. They conclude that independently not all products have the ability to attract visitors; often they need to be combined with other products that are not necessarily wildlife related (Canada/British Columbia Economic and Regional Development Agreement, 1988).

Similarly, diversity is required to appeal to tours; particularly birding tour groups require diversity. Interviews with four tour operators indicated that 75% of birders are retired, widowed, female and generally affluent and well educated. The successful birding tour has three requirements:

i) variety and diversity of birds with regard to aesthetics, habits and habitat;

ii) a well-informed leader with a sense of humor; and

iii) good food (Coopers and Lybrand, 1989).

Quality of experience and service is very important to the tourist who travels long distance and who is prepared to spend relatively large amounts of money. A Yukon study concluded that there is a significant American and Western European market but that the resources must be perceived by the market to be of the highest quality if they are to be successful at penetrating the market (Canada-Yukon Tourism Agreement, 1982). "A consistent theme throughout the market and product analysis is the need for substantial product upgrading not so much in the nature of the activity or experience but in the nature and calibre of services

that support those experiences. . . . Successful adventure lodges have similar qualities which include: a pristine but successful location; high standard of hospitality; comfortable, charming, rustic but aesthetically pleasing design and character; and the availability of a variety of activities" (Tourism Research Group, 1988). Not only must the resource and activity be of top quality, but also the services that support the activity.

2.5.5 Relationship of Consumptive and Viewing Activities

At first, it may seem that wildlife viewing, hunting and trapping are in conflict, since one involves the consumptive use of wildlife for sport, food or commercial value, and the other involves observation. However, the two are closely interrelated because they both rely on wildlife, wildlife habitats and to a large extent the same markets. Canadian survey data show that close to 10% of the adult population hunt while just over 20% are trip-based wildlife viewers. Approximately 95% of hunters participate in wildlife viewing activities other than hunting. This suggests that about half of trip-based viewers are hunters.

As described in the economic benefits section (2.2), sportsmen's activities account for a very large proportion of all wildlife-related expenditures. Given the very large values of total expenditures, this amount represents a highly significant economic contribution. "Specifically, this approach both confirms that hunting is an important activity in Canada and dispels the myth that hunting and non-consumptive wildlife-related activities attract separate and distinct publics" (Filion et al., 1983).

This relationship demonstrates the importance of developing wildlife viewing sites and programs in a manner compatible with hunting activities. Some of the best human resources for planning and interpreting wildlife viewing programs and opportunities are sportsmen and their organizations. This is evidenced through the

strong interest by the Alberta Fish and Game Association in developing and sponsoring watchable wildlife programs.

A recommendation of the British Columbia wildlife viewing study is that "integration of consumptive and viewing uses of wildlife resources is essential to the successful and sustained development of both kinds of wildlife-related activities" (Canada/British Columbia Economic and Regional Development Agreement, 1988).

2.5.6 Wildlife Viewing with Guides and Outfitters

Guides and outfitters in Alberta and other areas of Western and Northern Canada primarily serve markets of hunters and fishermen. Of the many guides and outfitters in Alberta, it is difficult to find more than a few who provide wildlife viewing experiences. However, discussions with Alberta guides and outfitters (personal communications) and several of the referenced studies indicate a strong desire and potentially good resources for these operators to expand their services.

Two reasons for this interest are:

i) guides and outfitters see the opportunity to expand their market base and operating season, enabling them to realize greater revenues; and

ii) regulatory and policy changes have made hunting, guiding and outfitting more difficult and less viable for some operators, thereby necessitating market diversification.

Alberta guides and outfitters will have to provide the quality of experience and support facilities tourists paying large fees expect to receive if wildlife viewing tourism is to be successful in Alberta. The B.C. guides and outfitters study recognizes that the quality of facilities is not an important criterion for hunters selecting a guide outfitter. For the non-hunting market, however,

this is not necessarily true (Canada/British Columbia Economic and Regional Development Agreement, 1989).

The Yukon study findings indicate that part of a wilderness experience product is the experience and knowledge of the guide. This means guides have to be of high quality and perceived by the tourist to be so, particularly when paying a premium price for a guided tour (Canada-Yukon Tourism Agreement, 1982).

Findings indicate that the industry is characterized by a large number of very small operators catering to a domestic market and that only a small number of full-service operations are well capitalized, have good cash flow, invest in marketing and product upgrading, and cater to international visitors (Tourism Research Group, 1988).

The discussion group sessions and interviews with operators indicated that a good resource is available in Alberta guides and outfitters. However, because guides will have to deal with a different market and experience than the hunting market, they will require assistance with product development, training in delivering the product, and marketing.

It was also indicated in the discussions and interviews and in some studies that if guides are to invest time and money in wildlife viewing products, some form of long-term security is desirable. This requires a commitment by government to the land and resource base used by guides.

2.5.7 Current Market Position

Watchable wildlife programs should accomplish the following:

1) provide enhanced opportunities for people to experience wildlife;

ii) promote learning about wildlife and its needs; and

iii) lead to active support of conservation (Hvenegaard, 1989).

Alberta does not have an extensive offering of developed wildlife viewing opportunities. However, its viewing opportunities are as or more developed than the other provinces in western Canada, with the exception of British Columbia. Alberta also rates very favourably with many of the western and mid-western states in terms of available viewing opportunities.

Alberta is better positioned than most other jurisdictions in terms of the quality and diversity of its viewing resources. The large variety of ecosystems in Alberta (from mountains, to foothills, to boreal forest, to grasslands) provides a rich habitat for a very wide diversity of abundant wildlife.

Albertans, next to residents of British Columbia, have the highest participation rate for primary-purpose wildlife-related trips and outings. The non-resident tourist industry in Alberta is well established. This includes tourists who come to Alberta for adventure travel. The potential markets are there for the viable development of wildlife viewing products.

It is important that wildlife viewing products are developed concurrent with marketing efforts and in a manner compatible with market expectations. The Yukon study concludes that if tourists have an unrealistically high level of expectation and are not satisfied, their negative word-of-mouth comments can undo most efforts to increase market penetration. Should it become apparent that resources are not of appropriate quality to meet market needs, commitment to pursue this market should be re-evaluated (Canada-Yukon Tourism Agreement, 1982).

Careful planning and positioning in product development, understanding the markets, and planning marketing campaigns is

required. There is a strong potential for growth if Alberta positions itself appropriately. The Watchable Wildlife Tourism Plan (Section 3.0) outlines Alberta's strengths and how the province can develop the wildlife viewing "product" and begin to effectively promote wildlife viewing in both resident and non-resident markets.

3.0 WATCHABLE WILDLIFE TOURISM PLAN

3.1 Goal

The goal of the watchable wildlife tourism plan is to improve the economic impact flowing from the wildlife resource in a sustainable manner. The plan defines a framework for increasing viewing information and opportunities to attract both resident and out-of-province tourists while maintaining the integrity of the wildlife resource.

3.2 Alberta's Watchable Wildlife Resource

The major attractions of Alberta to the wildlife viewer are its natural diversity and abundance of semi-wilderness land. No other place in the world has wildlife and landscapes representing the Rocky Mountains, Canadian Shield, Boreal Forest, Aspen Parkland and Grasslands. These include large, relatively unscarred tracts of land. This will enable Alberta to clearly identify its "product" as the diverse wildlife of the wide-open grasslands, extensive forests and waterways, and majestic mountains.

From a marketing point of view, there is the ability to key in on desirable species from each of these diverse regions:

. prairies: Ferruginous Hawk, Burrowing Owl, deer and Pronghorn;
. parklands: waterfowl, shorebirds, small mammals and songbirds;
. northern forests: Great Gray Owl, Common Loon and moose; and
. mountains: White-tailed Ptarmigan, bear, elk and mountain goat.

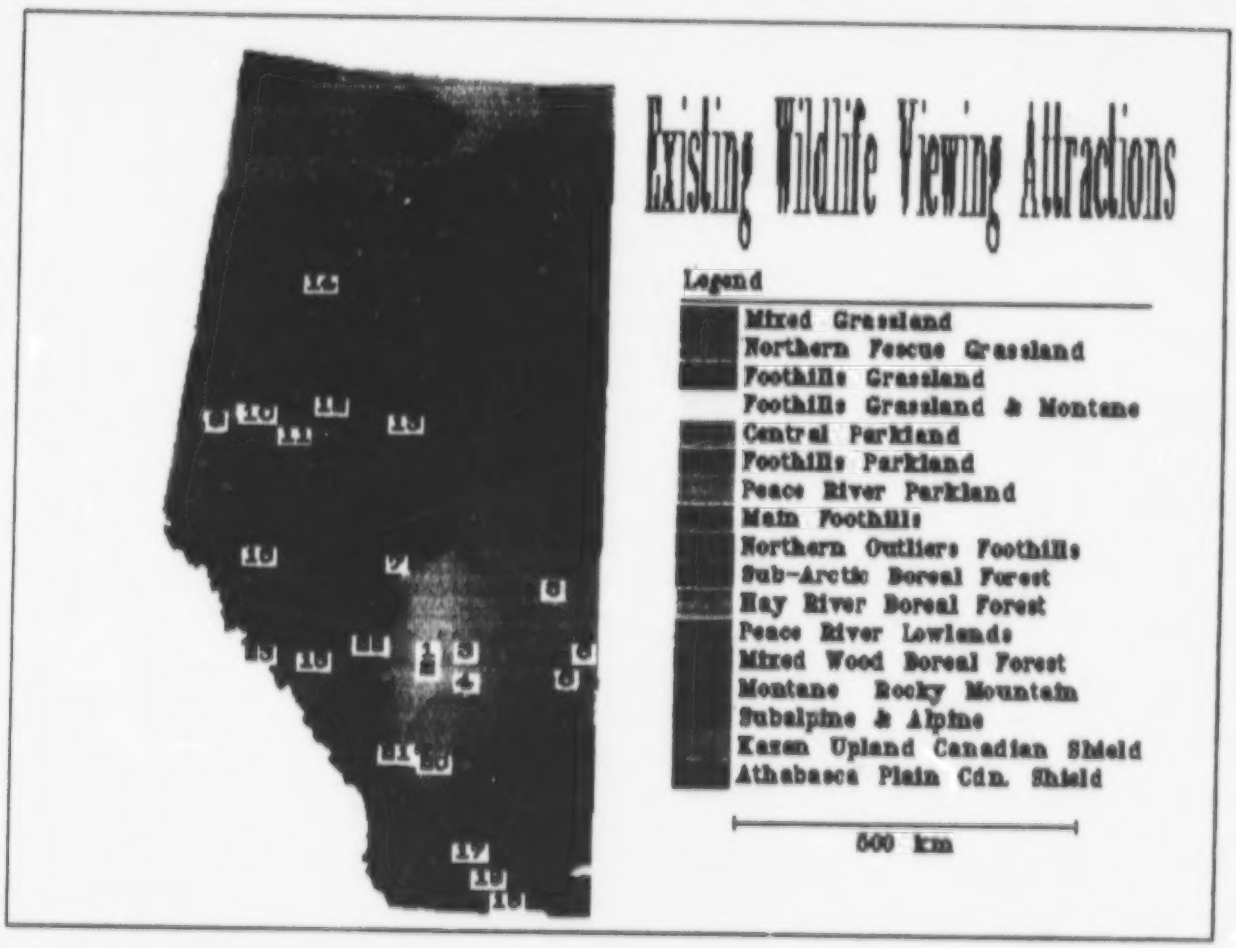
Tours can be developed which provide diverse or exceptional viewing opportunities (e.g., Cypress Hills; Red Deer River, including Dinosaur Park and Tyrrell Museum; mountain national parks/Kananaskis; Trail of the Great Bear; Wood Buffalo National Park; Northern Woods and Waters).

The following maps show twenty-three existing wildlife viewing attraction sites (Map 1). These are locations that currently

EXISTING WILDLIFE VIEWING ATTRACTIONS

1. Gaetz Lakes
2. Slack's Slough
3. Buffalo Lake
4. Dry Island Buffalo Jump Provincial Park
5. Gooseberry Lake Provincial Park
6. Dilberry Lake Provincial Park
7. Wabamun Lake
8. Vermilion Provincial Park
9. Saskatoon Island Provincial Park
10. Kleskun Hills Natural Area
11. Young's Point Provincial Park
12. Winagami/Kimiwan Lakes
13. Lesser Slave Lake Provincial Park/Hilliard's Bay Provincial Park
14. Notikewin Provincial Park
15. Whitegoat - Siffleur - Kootenay Plains
16. William A. Switzer Provincial Park
17. Helen Schuler Coulee Centre
18. Writing-on-Stone Provincial Park
19. Tyrrell - Rush Lakes
20. Wyndham - Carseland Provincial Park/McKinnon Flats
21. Fish Creek Provincial Park/Inglewood Bird Sanctuary
22. Crimson Lake Provincial Park
23. Banff and Jasper National Parks

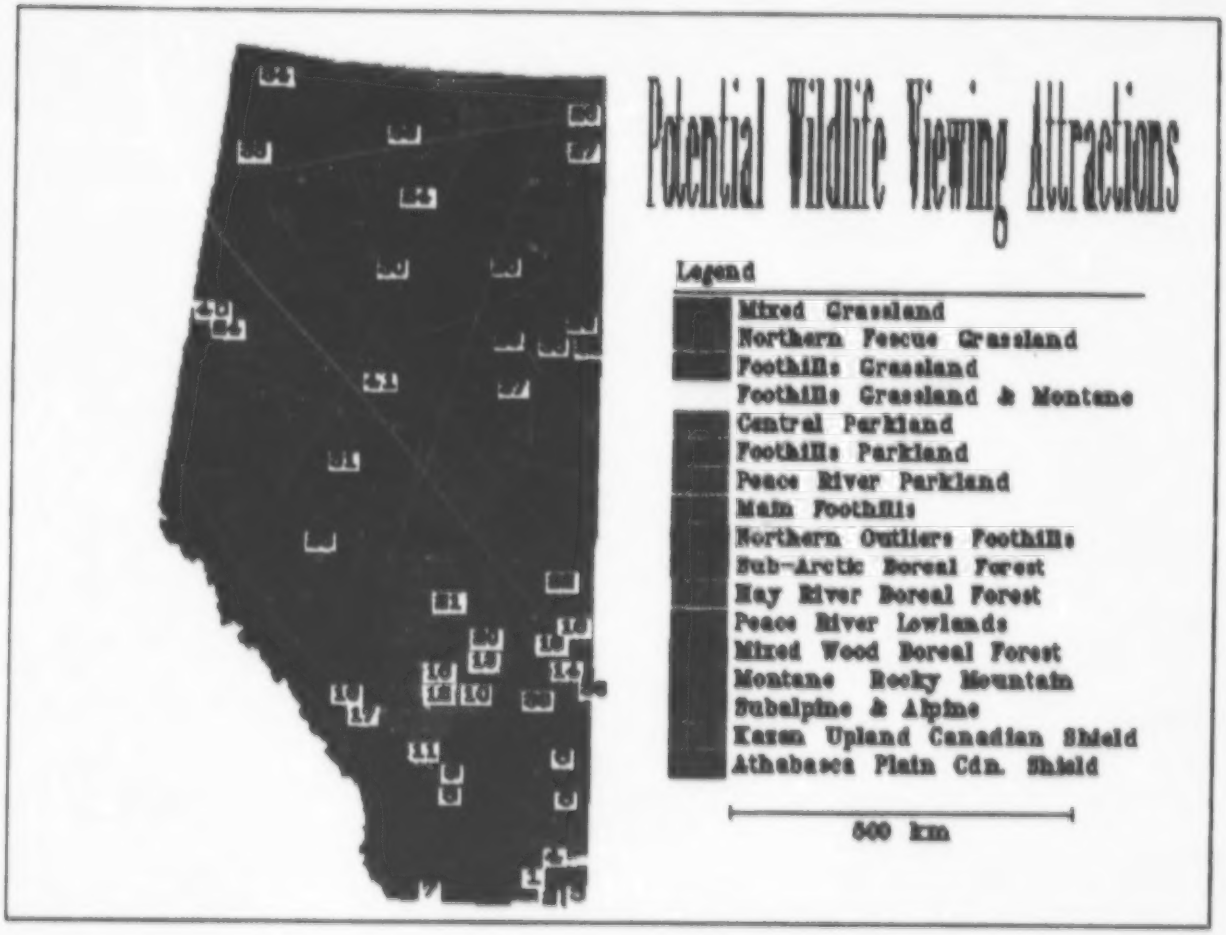
Map 1. Existing Wildlife Viewing Attractions



POTENTIAL WILDLIFE VIEWING ATTRACTIONS

1. Pakowki Lake
2. Milk River Canyon
3. Highway 41/Sage Grouse
4. Eagle Butte
5. Middle Sand Hills/South Saskatchewan River
6. Lower Red Deer River
7. Western Blue Flag Sites
8. McGregor Lake
9. Bow River - Blackfoot Indian Reserve
10. Rumsey Aspen Parkland
11. Eagle - Namaka - Stobart Lakes
12. Red Deer River - Tolman Badlands
13. Shooting Lake
14. Sounding Lake - Sand Plain
15. Reflex Lake
16. Mikwan - Goosequill Lakes
17. Burnt Timber - Waiparous
18. Panther Corners - Ya Ha Tinda
19. Wainwright - David Lake - Ribstone Creek
20. Battle River
21. Bittern Lake
22. Kenilworth Lake
23. Pioneer Lakes
24. Peace River Corridor
25. Birch Mountains
26. Canadian Shield Lakes
27. Lake Athabasca
28. Clearwater River
29. Athabasca River
30. Wabasca River
31. Goose Mountain
32. Gipsy - Gordon - Birch Lakes
33. Hay - Zama Lakes
34. Bistcho Lake - Cameron Mountains
35. Margaret Lake - Caribou Mountains
36. Christina River
37. Crow Lake
38. Bodo Hills - Altario - Muddy Buttes
39. Special Areas
40. Clear Hills
41. Utikuma Lake

Map 2. **Potential Wildlife Viewing Attractions**



WATCHABLE WILDLIFE AREAS

NORTHERN WOODS AND WATERS

- Cold Lake Provincial Park
- Sir Winston Churchill Provincial Park
- Therien Lakes
- Whitney Lakes Provincial Park
- Cross Lake Provincial Park
- Wagner Natural Area
- Clifford E. Lee Sanctuary
- Beaverhill Lake
- Ministik Lake Sanctuary
- Miquelon Lake Provincial Park
- Elk Island National Park
- Blackfoot Grazing Reserve
- Jessie Lake

WOOD BUFFALO NATIONAL PARK

- Salt Plains
- Peace Athabasca Delta
- Slave River Rapids

TRAIL OF THE GREAT BEAR

- Bow/Canmore Corridor
- Bow Valley Provincial Park
- Kananaskis Country
- Peter Lougheed Provincial Park
- Whaleback
- Porcupine Hills
- Crowsnest Pass
- South Castle & Big Sagebrush
- Waterton National Park
- Police Outpost Provincial Park
- Outpost Wetlands Natural Area
- Oldman River
- Beehive Natural Area

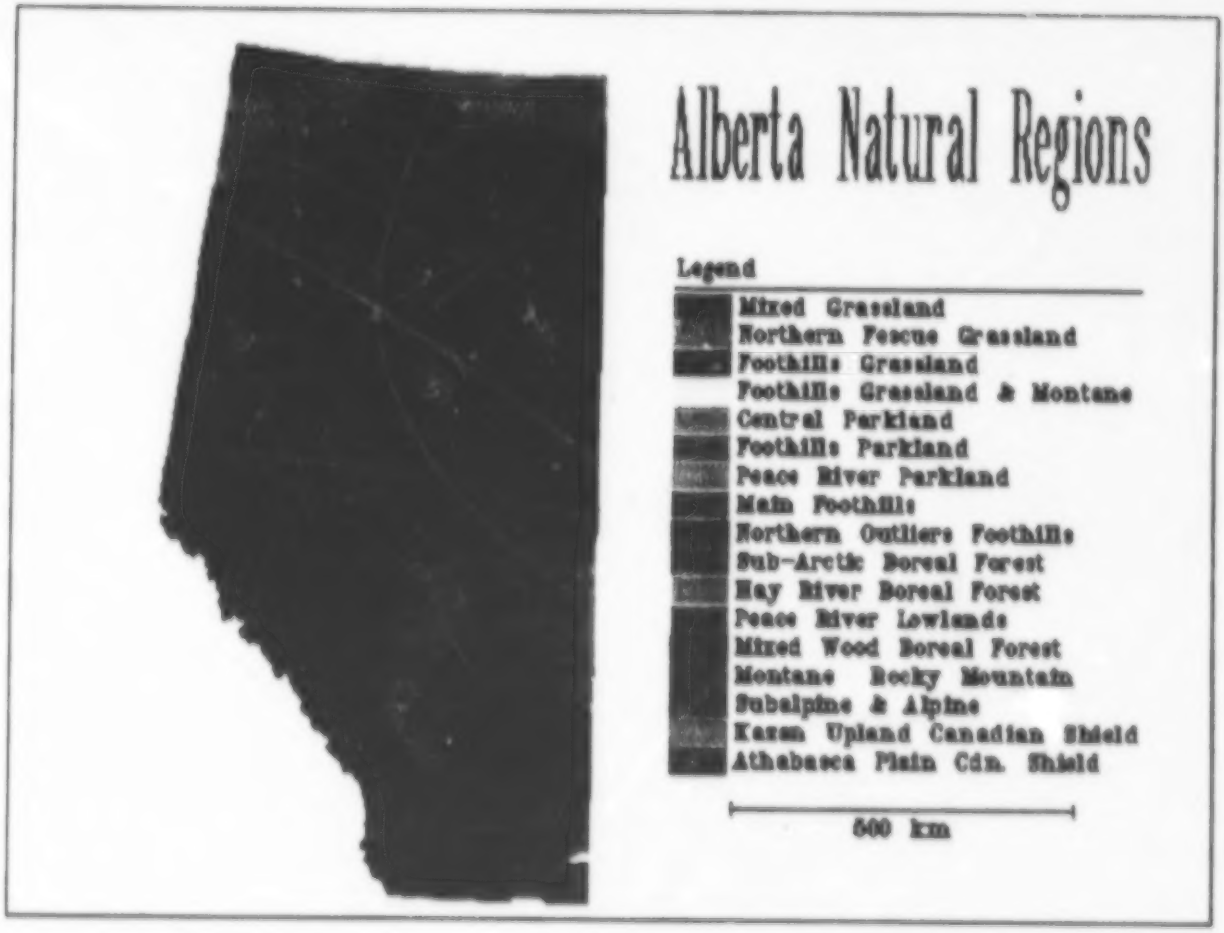
WILLMORE/KAKWA

- Willmore Wilderness Park
- Wild Kakwa
- Caw Ridge

TRANS-CANADA HIGHWAY - DRUMHELLER

- Cypress Hills Provincial Park
- Police Point Park
- Irvine Heronry
- Red Rock Coulee Natural Area
- Eagle Butte
- Lake Newell
- Eastern Irrigation District
- Dinosaur Provincial Park
- Red Deer River Corridor
- Hand Hills Ecological Reserve
- Suffield Military Reserve: Bison Ground Nesting Ferruginous Hawks

Map 3. Watchable Wildlife Areas



provide wildlife viewing opportunities and are presently managed in some form. All of these sites have either major or minor facility developments including such things as recreational services, interpretive information, signage, and trails. Forty-one potential wildlife viewing attraction sites were identified (Map 2). These are sites that presently do not have any facility development, but do provide viewing opportunities. Many of these sites are remote and would be logical for development by outfitters. Five watchable wildlife areas were identified (Map 3). These are areas which provide a range of wildlife viewing opportunities and are ideal locations for wildlife viewing tours.

3.3 Major Limiting Factors

Major barriers to developing wildlife viewing in Alberta include:

1. poor information base and low level of awareness;
2. lack of infrastructure and management to facilitate wildlife viewing; and
3. poor understanding of motivational factors.

i) information and awareness

A poorly organized information base combined with a general lack of awareness about existing and potential wildlife viewing opportunities outside the national parks is a major barrier to wildlife viewing in Alberta. This lack of awareness applies equally to the general public and tour operators. Up-to-date product information in the form of data bases, guidebooks, signage and maps is not readily available. Guidebooks which have been available in the past (e.g., Badlands and Bones Auto Tour) are now out of print. Products such as the Nature Guide to Alberta do not provide enough specific information for the wildlife viewer.

ii) infrastructure

Although Alberta is rich in wildlife resources, there is lack of a diversity of developed tourism products, including organized tours, and supporting infrastructure, especially viewing sites and trails. Air links, road access and food and lodging services are also deficient in some important wildlife viewing areas.

The lack of awareness of wildlife viewing opportunties has not encouraged an adequate level of protection of wildlife and habitat resources. Wildlife management is not currently geared to wildlife viewing. This has played some role in the scarcity of private sector involvement in wildlife viewing tourism outside the national parks. The creation of the Watchable Wildlife Program in Alberta Fish and Wildlife has been a positive influence and is beginning to change this situation.

iii) motivational factors

There is still a limited understanding of the factors which could motivate a substantial portion of the resident and non-resident markets to engage in wildlife viewing. A large proportion of the public is interested in wildlife but does not actively participate.

3.4. Watchable Wildlife Tourism Plan

The watchable wildlife tourism plan is a multi-layered product development and marketing approach to wildlife viewing which recognizes the roles of four primary groups: NGO's, private sector, universities and government. Government agencies should provide the basic tools including resource protection and management, education, and some promotion and on-site delivery. The private sector and NGO's should promote and deliver products. Universities and private research firms can provide some of the basic social science research to elaborate on factors which

motivate people to view wildlife. They can also do some basic environmental research on the impacts of wildlife viewing on species and landscapes.

Based on the market assessment, interviews and focus group sessions, the tourism plan for watchable wildlife concentrates on three areas:

1. product development, improvement and delivery;
2. the resident Alberta market; and
3. the out-of-province market.

Overall, the plan addresses ways of retaining existing market share and development of potential growth areas in both resident and out-of-province markets.

Short (up to 6 months), medium (6 months to 2 years) and long-term (more than 2 years) strategies are identified. The watchable wildlife tourism plan accommodates a variety of "wildlife tourists" from those who want more urban experiences to those who want to experience the thrill of viewing grizzly bears in remote wilderness environments.

The changing nature of the wildlife tourist is recognized. It is important to be prepared for new opportunities as needs change and the market matures. While there is still considerable opportunity in the adventure market, there is an increasing interest in low-risk adventure tours for families and a trend towards safe outdoor nature-oriented studies for children. With increasing concern about the global environment and ecosystems, there is an opportunity to promote and develop broad-based landscape and wildlife touring or "ecotourism." It is clear from the social research and market analysis, that ecotourism is expanding in both numbers of participants and diversity of experiences desired.

The spring and fall months, traditionally the shoulder season for the tourism industry in Alberta, have significant watchable wildlife possibilities but products are poorly developed and cannot yet be marketed aggressively. While there are some opportunities, poor winter road conditions, low levels of wildlife activity or wildlife sensitivity preclude a winter-oriented tourism program built exclusively on wildlife.

The short-term strategy should be to focus on auto-accessible or short hike wildlife viewing sites and wildlife resources which can be observed through several seasons. Important adventure opportunities in backcountry areas (e.g., Willmore-Kakwa, Wood Buffalo) with an existing infrastructure can also be promoted immediately. The medium and longer-term strategies will be to develop the necessary infrastructure for viewing wildlife in other sites, including the promotion of significant seasonal opportunities (e.g., fall warbler migration along southern river valleys; peak waterfowl and shorebird migration such as at Beaverhill Lake; trout spawning on Bill Griffiths Creek near Canmore; spring wildflower displays in southwestern Alberta; winter wildlife tracking).

Overall, Alberta must be seen as an appealing natural environment and there needs to be a promotional emphasis on our clean air, clean water and wildland qualities. In order to maintain these qualities and options for future growth, government commitment to tourism and protection of wildland and wildlife resources must be strengthened. In this regard, the establishment of a level playing field in terms of subsidies given to resource extraction industries and to the tourism industry needs to be investigated. Existing subsidies for resource extraction and agricultural commodities work at cross-purposes with ecosystem protection and maintaining wildlife viewing opportunties. If equivalent subsidies were given to "grow" wildlife, a very marketable commodity from a tourism perspective, there may be a longer-term sustainable benefit.

There is a major concern, expressed in the literature, interviews and discussion groups, that if actions are not taken immediately to protect wildlife and wildland tourism resources, then numerous important opportunities will be lost. The ultimate aim of the watchable wildlife tourism plan is to develop a hierarchy of opportunities, in urban, front-country and back-country settings, which will appeal to a broad variety of tourists. Unlike typical major tourism developments, wildlife viewing occurs as a wide variety of activities by small groups of people or individuals over extensive areas. As a result, many sites reflecting a wide variety of interests are required to meet market demands. This would provide opportunities for regional economic diversification through watchable wildlife tourism.

Making linkages with other tourism resources and infrastructure is essential to the success of any wildlife viewing tourism plan. In order to implement this watchable wildlife tourism plan, a commitment of staff time within Alberta Tourism and Fish and Wildlife is required. This will include coordinators and marketing staff to gather information on products, participate in land-use planning and integrate wildlife touring information with Alberta Tourism's promotions. Ongoing marketing is a key component of developing wildlife viewing in Alberta.

A formal committee to further develop and implement a comprehensive Watchable Wildlife Tourism Plan is required to ensure the success of the program. Representation should be from the private sector and appropriate government agencies such as Tourism, Recreation and Parks, Forestry, Lands and Wildlife, Education and Environment.

3.4.1 Product Development, Improvement and Delivery

While there are a variety of wildlife attractions in Alberta, a substantial amount of work is required to develop, improve and deliver the "wildlife viewing product". This will require cooperation from non-government conservation organizations (NGO's),

universities, the private sector, and federal and provincial governments.

The four components of this strategy for developing, improving and delivering the wildlife viewing product are:

1. development of watchable wildlife information;

2. training for tour guides, outfitters and interpretive staff at key provincial parks;

3. implementation of suitable on-site management and infrastructure; and

4. additional social and market research into factors which motivate people to view wildlife.

With respect to viewing information and on-site management, a major initiative will be required in some areas while only minor upgrading may be required in others. Some regulation of guiding activity to prevent negative impacts on the wildlife will also be required.

The overall approach recognizes the need to expand viewing opportunities from a few key nodes and to provide quality touring settings in a variety of Alberta landscapes. Crowding in nodes and a lack of awareness of landscape values could lead to a deterioration of the resource and a decline in the overall attractiveness of wildlife touring in Alberta.

Ecosystem approaches to interpretation and management and application of scenic analysis to regional developments are essential components of long-term product development. To a large extent, this requires a change in philosophy of how the rural countryside is managed. It is important not only to manage key protected area nodes, but also to retain hedgerows, shelterbelts,

and small woodlots and to develop highway viewing pulloffs and interpretive signage. **While major wildlife resources provide the focus for attracting tourists, it is the overall setting and variety of other opportunities which will encourage them to stay longer and to make subsequent return visits.**

Short-Term Strategy

1) information

Through a consultative process, the private sector, NGO's and other government agencies should develop an inventory of wildlife viewing resources including lists of:

1. primary attractions which have a poorly developed infrastructure and determine management, protection and infrastructure requirements;

2. primary attractions which have a well-developed infrastructure for inclusion into regional and provincial tourism information for domestic and out-of-province markets;

3. secondary attractions for inclusion into regional tourism information, primarily for the domestic market; and

4. guides, outfitters and tour operators who have capabilities or interest in watchable wildlife tourism.

As part of this process, the Government of Alberta should continue to participate in studies to identify and manage Environmentally Significant Areas. Studies have been completed in the Oldman River, Red Deer, Calgary and Edmonton Regional Plan areas. Environmentally Significant Areas reports provide a focus for land managers to identify key blocks of wildlife habitat for protection and management and also identify a variety of potential resources which could

appeal to the "ecotourist." Relative levels of significance indicate which resources are of international, national, provincial or regional significance. Combined with market information on viewing opportunities desired, the levels of significance can be useful in defining key potential attractions within regions.

This information will be useful in developing suitable on-site management and infrastructure as part of the medium and long-term strategies of product development, improvement and delivery.

The development of viewing tools (training manuals, guidebooks, checklists, brochures, maps, and text and locations for signage) is critical to both the domestic and out-of-province markets. These can be developed at both regional and provincial levels. Authors and publishers could be encouraged to participate through Recreation Parks and Wildlife Foundation and Alberta Tourism cooperative ventures.

ii) socioeconomic research

There needs to be additional socio-economic research on population segments not fully participating in wildlife viewing. This research would home in on the barriers to participation and would identify factors which could motivate these segments of the Alberta public to actively participate in wildlife viewing.

Medium-Term Strategy

The next step in product development would be to:

1. develop an easily updated watchable wildlife data base for provision to tour operators, outfitters, museums and travel information centres;

2. train outfitters and guides in approaches to and opportunities available in wildlife viewing; and

3. where necessary, implement protection and appropriate management of sites identified as primary attractions and develop required on-site infrastructure (e.g., signage and access points appropriate for wildlife viewing; seasonal accommodation).

i) information

Focal points for the watchable wildlife data base should include protected areas (both public and private) which allow public access. Providing information on significant wildlife viewing sites where access is difficult or not allowed will have a negative impact on wildlife tourism. The data base which is developed should list opportunities by category (e.g., shorebirds, waterfowl, large mammals, wildflowers, urban, adventure) and include seasonal events, and a directory of tour operators. Ideally, it would have the ability to quickly add information which can direct people to immediate wildlife viewing opportunities. In addition to regional information centres, a centralized data base should be maintained by a provincial coordinator to aid operators in developing tours and as a resource for the regional information centres.

ii) training guides and outfitters

The role of guides and outfitters should be expanded from traditional hunting and fishing activities into wildlife viewing. While the quality is inconsistent, there is a reasonable amount of infrastructure in place which could accommodate some watchable wildlife tourism. This would expand their capabilities into seasons which have traditionally been undersold. Training of outfitters in the area of watchable wildlife will play a major role in the long-term success of wildlife viewing programs, particularly

for the out-of-province market. Wherever possible, wildlife viewing opportunities should be identified in promotions of guides and outfitters. A workshop sponsored by Alberta Tourism could be a useful way of involving more guides, outfitters and other tour operators in watchable wildlife tourism.

iii) Implementation of suitable on-site management and infrastructure

Wildlife viewing is a land-based activity and is generally undertaken as part of broader scenic touring and outdoor recreation activities. Parks and other protected areas provided a focal point for tourists. In order to better develop the wildlife tourism resource, there needs to be a thorough review and updating of Public Lands policies to support wildlife viewing and a substantial increase in lands reserved for protected areas and areas actually developed for wildlife viewing. This will create a sufficient critical mass to support a viable wildlife tourism industry outside established tourism areas. This should not be seen as conflicting with the private sector but as a means of facilitating private sector opportunities both within and outside these areas.

Support from Chambers of Commerce, local tourism operators and local conservation organizations should be enlisted to increase support for wildlife tourism and the necessary long-term habitat protection required for it.

Logical river corridors (e.g., Red Deer River), wildland blocks (e.g., Middle Sand Hills/South Saskatchewan River, Kakwa) and agglomerations of wildlife viewing opportunities (e.g., northern woods, wetlands and lakes in the Aspen Parkland and Lakeland districts) should receive highest priority (Map 3).

Appropriate interpretive information and access (e.g., highway pulloffs, viewing platforms, trails) should be developed. Any developments or promotion of sites must take into account the sensitivities of wildlife resources. Alberta Recreation and Parks, the Natural and Protected Areas Program and Fish and Wildlife's Watchable Wildlife Unit all have key roles to play in this regard. Local NGO's should be encouraged to act as volunteer stewards, to provide information about wildlife events (e.g., club field trips, signficant wildlife sightings) to regional tourism information centres and to help with maintenance.

To complement the existing accommodations and food services, low-key bed and breakfast-style facilities should be encouraged and advertised through Alberta Tourism publications. Unlike major developments which require major investment and multi-season attractions, low-key facilities may provide the short-duration accommodation required to access seasonal wildlife viewing events in areas where there is minimal tourism infrastructure and only require a minimum of capital outlay on the part of the private sector. This is seen as complementary to existing tourist accommodations and not as a replacement for them.

Long-Term Strategy

Key steps in the long-term strategy are:

- to clearly define policies on public land management which will improve wildlife viewing opportunities;
- more input from Alberta Tourism in land-use planning; and
- upgrading food services and accommodation infrastructure to cater to the ecotourist.

i) inter-agency coordination and policy definition

There needs to be overall coordination with other government agencies to improve overall wildlife and ecosystem/landscape management to retain or enhance scenic travel corridors and improve access to public and, possibly, private lands. Clearly spelled out government policies on public lands are essential to long-term maintenance of wildlife viewing opportunities. It has been suggested that these policies be developed in concert with the Alberta Conservation Strategy and presented to the public in document which some NGO's and government agencies are referring to as a "Greenprint for Public Lands."

ii) an expanded role for Alberta Tourism in land-use planning

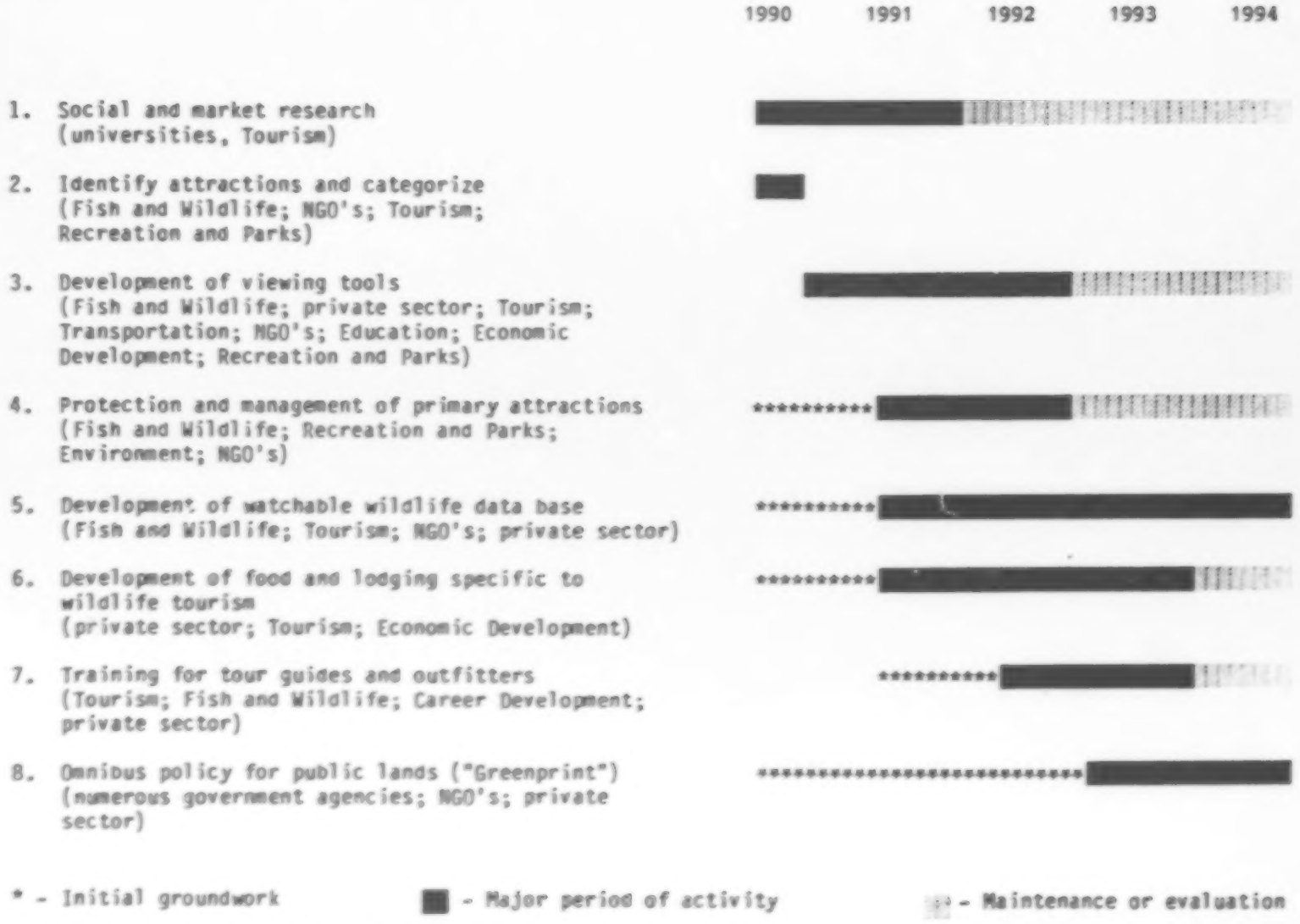
Alberta Tourism should play a larger role in land-use decisions which affect significant travel routes and tourism resources and require participation in planning for protected areas (e.g. parks, ecological reserves, wildlife refuges/viewing sites).

iii) upgrading visitor services

Some development of food and lodging facilities in remote areas by the private sector will be required, especially for those people who do not wish to camp. Small-scale, environmentally appropriate accommodations may help to attract visitors to areas of Alberta outside the major travel corridors. These could be basic cabin accommodations within a natural setting as have been developed in Finland and Sweden. Changes in operating hours of existing facilities to accommodate the needs of wildlife viewers in various seasons may also be required in certain areas (e.g., early birder breakfasts, midnight owl meals, box lunches).

Timelines for implementation are presented in Figure 1.

Figure 1. **Product Development, Improvement and Delivery**


1990
1991
1992
1993
1994
1. Social and market research (universities, Tourism)
2. Identify attractions and categorize (Fish and Wildlife; NGO's; Tourism; Recreation and Parks)
3. Development of viewing tools (Fish and Wildlife; private sector; Tourism; Transportation; NGO's; Education; Economic Development; Recreation and Parks)
4. Protection and management of primary attractions (Fish and Wildlife; Recreation and Parks; Environment; NGO's)
5. Development of watchable wildlife data base (Fish and Wildlife; Tourism; NGO's; private sector)
6. Development of food and lodging specific to wildlife tourism (private sector; Tourism; Economic Development)
7. Training for tour guides and outfitters (Tourism; Fish and Wildlife; Career Development; private sector)
8. Omnibus policy for public lands ("Greenprint") (numerous government agencies; NGO's; private sector)
* - Initial groundwork
- Major period of activity
- Maintenance or evaluation

3.4.2 Resident Alberta Market

The focus of activities with respect to the Alberta market should be:

1. marketing, and
2. education.

The most important aspect of the watchable wildlife tourism plan with respect to the resident Alberta market is to effectively market the product to retain the existing market share of wildlife viewing by providing more information and maintaining or enhancing quality of existing resource and associated infrastructure (see product development). There is some potential growth in the redirection of a portion of the out-of-province travel.

The general marketing approach should be to concentrate on shorter trips (e.g., weekends, trips less than a week). Over the short-term, the Alberta market may not generate much "new" tourism revenue based on wildlife viewing but, in the long-term, it has the potential to be significant.

The essential component of the long-term strategy is to incorporate wildlife viewing into Alberta's educational system. This would have beneficial spin-offs in future tourism and in terms of protection of the wildlife resource.

Short-Term Strategy

i) marketing

An important part of the short-term Alberta market strategy should be the promotion of the Alberta Wildlife Viewing Guide. Promotions by major retailers could put this document into the hands of large numbers of Albertans. It is essential that watchable wildlife information be readily available in travel information centres, museums, nature centres, and provincial and national parks across Alberta. With respect to tourism

promotions, this should be packaged as part of a "great outdoors" experience.

Media support should be enlisted to focus on wildlife viewing opportunities in Alberta. ACCESS, tourism programs which run on network and cable channels, magazines such as West World, Western Living, and weekly newspapers all afford low-cost or no-cost opportunities for communicating wildlife viewing information. A number of Alberta writers and radio and television hosts have already demonstrated their interest in promoting wildlife and wildlife viewing. Similar projects in the United States (e.g., Sierra Club guides to Natural Areas) have been very successful in informing people about opportunities away from established travel routes.

Medium-Term Strategy

1) marketing

The next step in the plan for the Alberta market should be to develop incentives to interest the domestic market in watching wildlife in Alberta (e.g., Watchable Wildlife Stamp Book). There should be continued media promotion of additional sites as the infrastructure is developed and also increasing emphasis on backcountry and specialty tours which incorporate the full variety of Alberta wildlife and recognize seasonal events (e.g., development of Shorebird Days at McLellan for Kimiwan Lake; possibly Great Blue Heron Days at Barrhead).

Packaging is very important--people interested in wildlife viewing may also be interested in interpretation of wildlife management facilities (e.g. Peregrine Falcon breeding facility at Wainwright) and prehistoric resources (e.g., Head-Smashed-In, Tyrrell Museum and numerous other undeveloped sites). Marketing of key wildlife viewing events should also be started (e.g. Edmonton Christmas Bird Count - the largest in the world; May Wildflower, Mammal and Bird Counts).

"Wildlife Discovery Packs" could play an important role in packaging watchable wildlife information.

ii) education

Linkages with Alberta Education should be made to further develop curriculum materials for elementary to high school grades which will facilitate nature study and incorporate more wildlife viewing. Wildlife learning resources manuals would assist educational institutions in exploring watchable wildlife opportunities in various regions throughout Alberta. This is essential to the long-term strategy for development of the Alberta market.

As socio-economic research data becomes available, additional strategies to encourage more participation in wildlife viewing should be developed.

Long-Term Strategy

i) education

The cornerstone of the long-term Alberta strategy is the implementation of wildlife viewing programs in the school curriculum. This could be facilitated by volunteers from organizations like the Alberta Fish and Game Association which have a membership base broadly distributed throughout the province. The approach will be to first encourage wildlife viewing in a familiar setting (city parks, backyard) and then to gradually introduce the students to wilder settings and the full variety of wildlife.

A component of the education program would be to further develop wildlife interpretive centres or educational natural areas close to population centres (e.g., Big Lake, Beaverhill Lake, Bretona Pond, Strathcona Wilderness Centre, Devonian Botanical Garden in the Edmonton Area). Wildlife viewing opportunities for each region should be packaged into a

regional manual or database which describes learning resources available, as well as camps, tour operators and educational facilities. There needs to be a broad variety of outdoor learning experiences easily accessible to the majority of Alberta's students.

Timelines for implementation are presented in Figure 2.

3.4.3 Out-of-Province Market

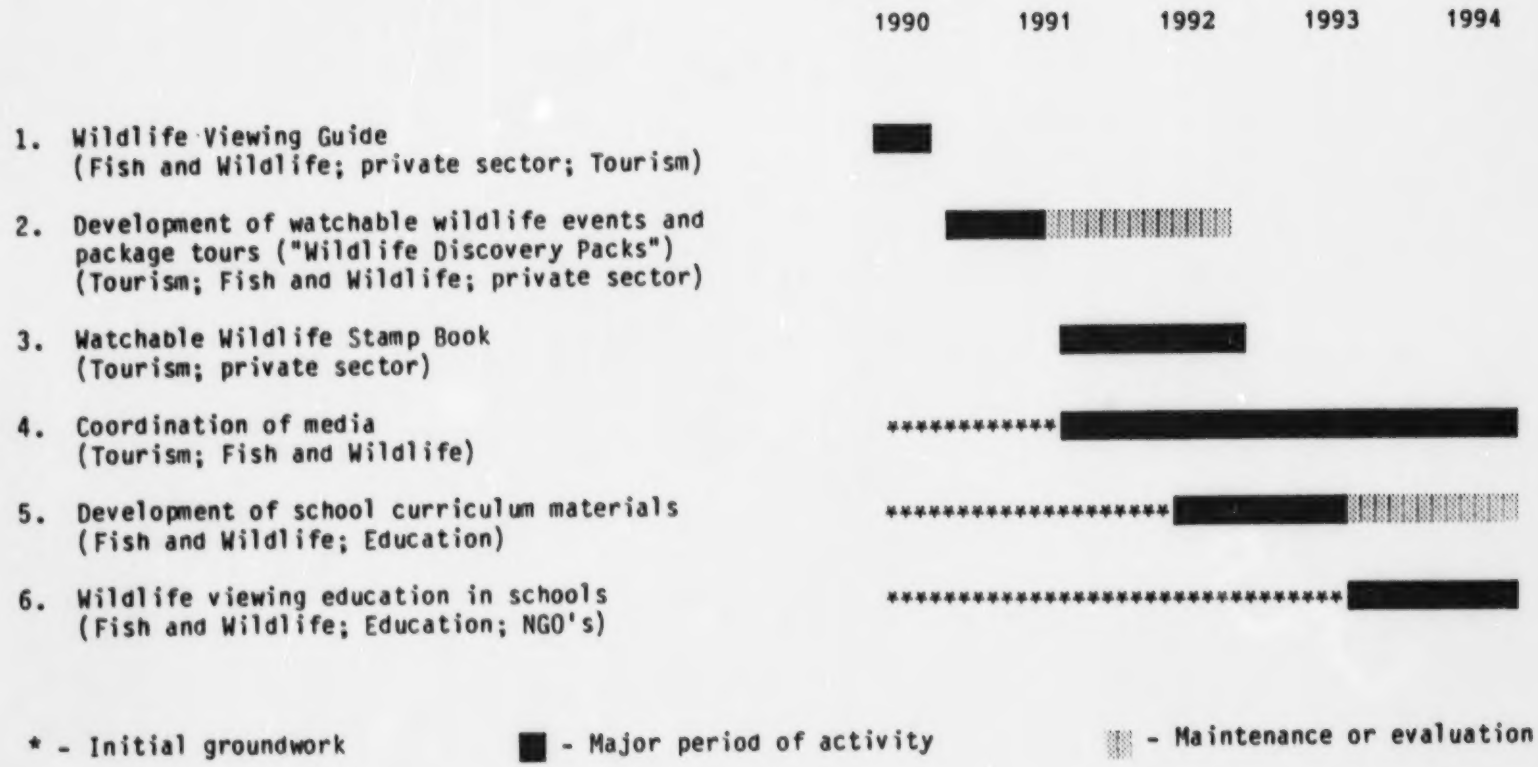
The key approach to the out-of-province market will be a carefully-thought-out and phased-in marketing strategy.

Based on the background research, it appears that out-of-province visitors will travel further and spend more in order to access primary wildlife and wildland attractions. A diversity of watchable wildlife and solitude are important components of a quality experience. In order to retain Alberta's wildlife viewing market share, it will be necessary to maintain or enhance the quality of the existing resource and the associated infrastructure (see product development).

It is important to promote out-of-province wildlife viewing only where there is a quality infrastructure for urban, front-country and adventure opportunities and appropriate management systems. Attracting out-of-province visitors to poorly managed sites would have negative long-term impacts on wildlife tourism development in Alberta.

The major out-of-province target markets would appear to be the relatively affluent, heavily populated urban areas where there are few wilderness/wildlife viewing opportunities. Examples include southern California, Europe (especially Germany), the eastern United States and, possibly, southern Ontario. Potentially, this is a significant tourism dollar generator if quality experiences are provided and maintained.

Figure 2. **Resident Alberta Market**


1990
1991
1992
1993
1994
1. Wildlife Viewing Guide
(Fish and Wildlife; private sector; Tourism)
2. Development of watchable wildlife events and package tours ("Wildlife Discovery Packs")
(Tourism; Fish and Wildlife; private sector)
3. Watchable Wildlife Stamp Book
(Tourism; private sector)
4. Coordination of media
(Tourism; Fish and Wildlife)
5. Development of school curriculum materials
(Fish and Wildlife; Education)
6. Wildlife viewing education in schools
(Fish and Wildlife; Education; NGO's)
* - Initial groundwork
- Major period of activity
- Maintenance or evaluation

The potential in the Asian market would appear to be large but we have no data on their participation and interest in wildlife viewing activities. This may be an important area for future research.

Short-Term Strategy

The first step is to promote primary attractions and groupings of attractions where there is a well-developed infrastructure. Information is required to facilitate trip planning. Tour operators, outfitters and promoters need training in the variety of wildlife viewing products available and the potential market areas.

An important component of promotion is getting the message across in specialty magazines (e.g., Audubon, Nature Canada, Borealis, National Geographic Traveler, airline magazines, U.S. birding magazines). This can be in the form of articles and advertising. Advertising power can be noticeably improved when positive articles on Alberta are published in the same issue. As in the resident Alberta market strategy, there should be encouragement for writers and other media.

Medium-Term Strategy

Once products have been developed and sufficient infrastructure is in place, additional primary attractions can be promoted. This will expand the resource base available for promotional campaigns and for writers and other media to draw upon. At this time specialty tours and "Wildlife Discovery Packs" specifically designed for the out-of-province tourist could be developed.

Contacts should be made with various nature conservation groups, horticultural societies and scientific organizations, especially those in North America and Europe. They should be informed of the variety of wildlife viewing opportunities and the great potential for conferences and tours in Alberta. Financial assistance for

conference budgets would increase interest. Alberta Tourism should expand its conference activities to include conferences for conservation and nature organizations. The Canadian Nature Federation is planning on holding a 1991 conference in Red Deer and the North American Wildlife and Natural Resources Conference is also scheduled for 1991 in Edmonton.

Private operators should be kept informed of and encouraged to attend important trade shows with an outdoors orientation.

Film and video materials could be developed as short programs to be presented before in-flight movies on airlines, for community cable TV, for trade shows, and for tour operators, guides and outfitters who are promoting their operations.

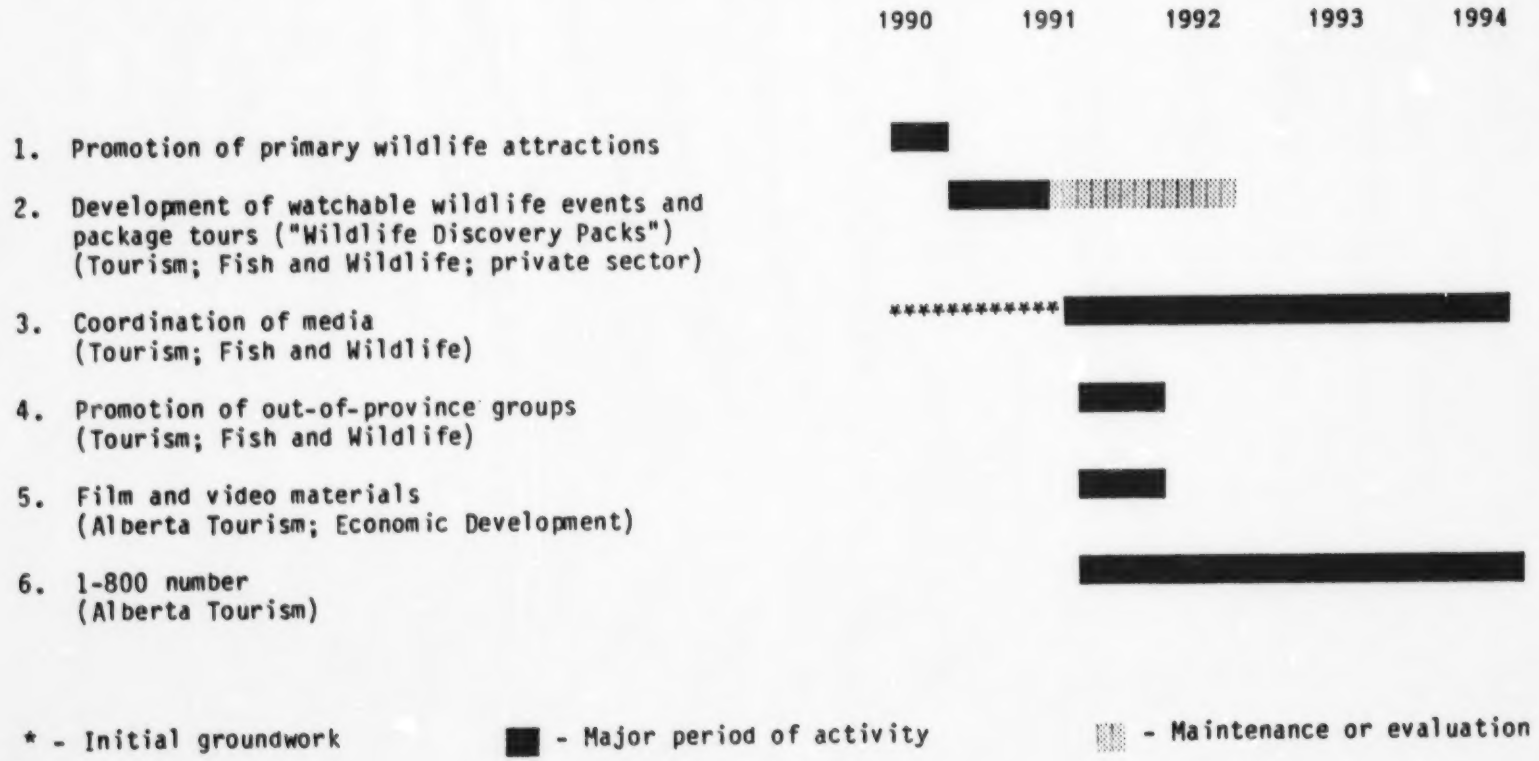
The development of a North American 1-800 phone number e.g. 1-800-NATURAL or 1-800-ALBERTA should be investigated. This would be staffed with people knowledgeable about wildlife resources and would have materials to send out to interested parties.

Long-Term Strategy

The long-term potential for the out-of-province market hinges on the overall approach of Alberta to ecosystem management and environmental quality. If appropriate land management strategies are put in place, Alberta's "ecosystem product" will have a major out-of-province market appeal. Since ecotourism appears to be a significant growth opportunity, Alberta could become a leader in this area if its natural capabilities are aggressively protected, managed and promoted. This could position us near the top of the wildlife viewing market.

Timelines for implementation are presented in Figure 3.

Figure 3. **Out-of-Province Market**


1990
1991
1992
1993
1994
1. Promotion of primary wildlife attractions
2. Development of watchable wildlife events and package tours ("Wildlife Discovery Packs") (Tourism; Fish and Wildlife; private sector)
3. Coordination of media (Tourism; Fish and Wildlife)
4. Promotion of out-of-province groups (Tourism; Fish and Wildlife)
5. Film and video materials (Alberta Tourism; Economic Development)
6. 1-800 number (Alberta Tourism)
* - Initial groundwork
- Major period of activity
- Maintenance or evaluation

3.4.4 Resourcing

Resourcing can come from a variety of sources. While a significant portion of product development funding should come from the agencies responsible (Recreation and Parks; Tourism; Forestry, Lands and Wildlife; Education; Transportation; Economic Development; Career Development), lottery funds could provide a significant influx of capital for development of magazine articles, viewing materials, on-site developments such as trails and viewing platforms, private land access agreements and interpretive signage. If handled correctly, corporate sponsorship could potentially be the biggest source of revenue for promotional campaigns. Corporations like Petro-Canada, Canada Life, Shell and Superstore have already demonstrated their interest in environmental and wildlife promotions.

The private sector will continue to play the lead role in operating and promoting specific attractions. Due to the public nature of the resource, the private sector is not considered to be the prime funding vehicle for product development and raising overall awareness of wildlife tourism in Alberta.

There have been recent discussions at the federal level about the removal of commodity subsidies for agriculture and replacing these with a farm income subsidy. It has been suggested by various conservation organizations that commodity subsidies for agricultural crops could be replaced with a subsidy for retaining natural landscapes, in essence to "grow wildlife - but not according to the traditional game farm definition. This would not reduce farm revenues or increase government expenditures but it would prevent further conversion of marginal agricultural land to cropland, thereby protecting wildlife habitats and providing a host of other benefits including soil and watershed protection and increased tourism opportunities.

Special entrance fees could be charged for facilitated wildlife viewing sites on public lands if there are interpretive or other wildlife viewing facilities which justify the charge and if the money is to be directed back at management of the site. Voluntary lock boxes at viewing sites would also be a way of raising funds.

Annual conservation passes and wildlife stamp programs could be implemented if the funds could be directed to specific wildlife conservation programs. Based on the United States experience in income tax check-offs and special taxes and fees applied to certain products (e.g., recreation vehicles, boats, off-highway vehicles, percentage of revenues from stumpage fees, mineral royalties), there is considerable potential for directing funds towards wildlife conservation programs. Discussions in the focus groups indicated a moderate degree of support for directed funding programs (Hvenegaard, 1989).

3.4.5 Initial Watchable Wildlife Marketing Strategy

The watchable wildlife marketing strategy will focus on:

1. retention or expansion of existing markets;
2. exploring select new target markets;
3. defining potential future markets; and
4. initial wildlife promotions.

The goal of the marketing strategy is to efficiently and cost effectively inform markets of the variety of wildlife viewing opportunities available in Alberta and the associated facilities and attractions which comprise the quality experiences that can be found. However, the marketing strategy must be considered in the context of an overall Watchable Wildlife Tourism Plan. This plan is essential to long-term development of wildlife tourism in Alberta. The plan addresses the need to develop the wildlife viewing product before intensive out-of-province marketing can be undertaken. The infrastructure and adequate wildlife resource

protection and management do not yet exist to fully promote wildlife viewing to out-of-province markets. Non-residents will make higher investments to travel here and, consequently, have higher expectations than Albertans with respect to wildlife viewing experiences and quality of associated facilities. While there are some immediate opportunities identified in this strategy, too early a promotion on a broad scale could have long-term negative impacts on the non-resident market.

Marketing of the wildlife viewing opportunities must be done in conjunction with other attractions (e.g., Tyrrell Museum, Head-Smashed-In Buffalo Jump) which will interest the wildlife tourist.

While major wildlife resources provide the focus for attracting certain tourists, it is the overall quality of the setting and the variety of other opportunities which will encourage them to stay longer and to make subsequent return visits. Protection and appropriate management of key landscapes and key wildlife areas are essential to the long-term viability of watchable wildlife tourism. Timing is also critical. Other jurisdictions are developing wildlife tourism plans and Alberta could lose market share if it does not respond quickly.

Retention or Expansion of Existing Markets

Specific steps which can be taken to expand or retain existing markets include:

1. Alberta Wildlife Viewing Guide promotion, possibly as a giveaway through arrangements with major retailer(s) like Safeway and Food for Less which would give the guide away or sell at a greatly reduced rate to their customers with a purchase over a certain value. The major retailer(s) would buy it at cost from the publisher in sufficiently large volumes to keep the printing costs low or it could be subsidized by

government as part of a marketing promotion. The retailer(s) would also be expected to advertise the book in their newspaper and television promotions. This would put the book in the hands of a large number of wildlife viewers and would greatly increase the exposure of the watchable wildlife program at a minimal cost to the Alberta Government.

In order to reach the travelling public and rural residents who may not have access to major centres and the major retail promotion, the guide could be sold through Travel Information Centres, local Fish and Game Associations, and service stations on major highway corridors. There is also the possibility of a promotion through IGA or bulk fuel sales agents like UFA or ESSO that would be similar to the promotion in urban areas through a major retailer(s).

On a smaller scale, retailers such as wilderness, sporting goods, photography, and outdoor recreation equipment stores would be logical vehicles for distribution of the viewing guide.

2. Implementation of a Watchable Wildlife Stamp book which would have sites from all over Alberta representing various species or natural regions. This would be a similar promotion to Stamp around Alberta. This may be particularly effective if it were to be promoted and encouraged through schools as an educational tool. The Wildlife Stamp Program would then have the potential of very quickly becoming a family-minded activity through the involvement children would request of their parents. Participants at the discussion group sessions were particularly enthusiastic about the potential of the Wildlife Stamp Program.

3. Incorporation of wildlife viewing sites via symbols on provincial highway maps.

4. Development of a calendar of wildlife activities, programs and special wildlife events related to wildlife viewing (e.g., Christmas Bird Counts, McLennan Shorebird Days).

5. Providing background information, visual material and articles to domestic media, including such publications as Western Living, West World, CAA/AAA guidebooks, in-flight airline magazines, Canadian Geographic, Nature Canada, and possibly Borealis. This would include the development of writers and media contacts and the formulation of a media strategy. Producers of television and radio programs and news would also be involved.

6. Production of display(s) for use in trade shows.

7. Incorporation of wildlife viewing information in Alberta Tourism publications such as the touring and adventure guides to include a listing of wildlife guides, outfitters and tour operators who have capabilities or interest in wildlife viewing tourism.

8. Development of "Wildlife Discovery Packs" - These discovery packs would be a series of materials pertinent to a well-travelled region or tour, e.g., Northern Woods and Waters Tour, Trans-Canada Highway-Drumheller, Trail of the Great Bear Tour. The information would include general tour guides which amalgamate a variety of wildlife, cultural and other attractions; brochures on key wildlife viewing areas, e.g., provincial or national parks; and a calendar of events through the seasons.

9. Reprinting or updating guides like the Badlands and Bones Auto Tour which have a significant environmental interpretation component.

10. Producing video material for promoting wildlife.

Exploring Select New Target Markets

The first approaches to exploring new target markets would include:

1. identifying key media in Great Britain and Germany and writers for articles to promote Alberta's wildlife resources. Concentration should be on those areas with sufficient infrastructure (Map 1);

2. developing articles and advertising in key conservation magazines with large circulations in the United States and eastern Canada, e.g., Equinox, Birdwatcher, Wild Bird, Audubon, Sierra, National Geographic Traveler and Natural History. Advertising would be accompanied by a reader response card or number that could be used to identify the source publication in order to monitor the success of the advertising campaign by publication;

3. coordinating with major zoological societies like the New York and San Diego Zoological Societies to identify opportunities associated with zoos and wildlife viewing in Alberta. This would include familiarization tours; and

4. exploring adventure nature tour possibilities with companies like the Adventure Centre and Worldwide Adventures in Toronto and Canadian Nature Tours in Don Mills, in concert with Alberta outfitters and guides. This would include familiarization tours.

Defining Potential Future Markets

There needs to be an ongoing program of identifying potential future markets through monitoring of socioeconomic trends, visitor preferences and tourism travel patterns. Based on the limited market information now available, it is possible to segment the market into three broad categories for monitoring:

i) domestic market: represents a very broad range of people from all locations and with a large diversity of ineterests and preferences;

ii) out-of-province residents in Alberta for a primary trip purpose other than wildlife viewing, but who would be interested in viewing activities if they were made aware and had the experience facilitated; and

iii) out-of-province residents in Alberta for a primary wildlife viewing trip purpose.

Initial Wildlife Viewing Promotions

CAMPAIGN THEME: "TAKE A WALK ON THE WILD SIDE"

1. **Wildlife Viewing Guide**
   Target Audience: Resident Alberta market, primarily urban areas like Calgary, Lethbridge, Edmonton, Medicine Hat and Red Deer, but also rural centres.
   Target Media: Local and regional media, primarily print media, but also news and documentary coverage on television and radio.
   Merchandising Approach: Use of Wildlife Viewing Guide as a promotional item by major retailers.
   Cost: $50,000 (depends on commitment of retailers, per-unit cost of viewing guide).

2. **Watchable Wildlife Stamp Book**
   Target Audience: (as above).
   Target Media: (as above).
   Merchandising Approach: Watchable Wildlife Stamp Book to be distributed widely in travel information centres and schools.
   Cost: $50,000.

3. **Media Promotions in Alberta**

   Target Audience: (as above).

   Target Media: (as above).

   Merchandising Approach: Articles and news releases working in conjunction with the viewing guide and stamp programs. Travel and outdoor writers would be sponsored or encouraged to develop articles.

   Cost: $30,000.

4. **Media Promotions out of Province**

   Target Audience: Nature observers, conservationists and outdoor enthusiasts in Germany, Great Britain, eastern Canada, northeastern United States, and California.

   Target Media: National conservation and nature magazines serving the above countries.

   Merchandising Approach: Articles and associated advertising promoting key wildlife attractions with sufficient infrastructure. Emphasis should be on the diversity of opportunities and abundant wildlife. Travel and outdoor writers could be sponsored or encouraged to prepare articles.

   Cost: $50-75,000.

5. **Travelling Display**

   Target Audience: Attendees at trade shows.

   Target Media: Sportsmen and travel shows, including such shows as Southern Waterfowl Festival in Charleston, S. Carolina.

   Merchandising Approach: Full-color, attractive display depicting the diversity of wildlife viewing opportunities in forests, grasslands and mountains. Additional support material would be available.

   Cost: $25,000.

6. **Tour Operator Promotions**

   Target Audience: Key wildlife and adventure tour operators in eastern Canada, United States and Europe.

Target Media: Personalized letters of invitation to participate.

Merchandising Approach: Free trips to experience specific wildlife tours. At a minimum, consideration should be given to production of film/video materials which could be used by program coordinators to send to tour operators.

Cost: $25,000.

7. **Wildlife Discovery Packs**

Target Audience: Resident Alberta and non-resident markets.

Target Media: Travel Information Centres and inquiry response to advertising in conservation and nature magazines.

Merchandising Tools: Brochures, tour guides, calendar of events.

Cost: $30,000 per tour (Northern Woods and Waters, Trans-Canada-Drumheller Trail of Great Bear).

4.0 RESEARCH RECOMMENDATIONS

Wildlife viewing tourism in Alberta, as in other jurisdictions, is a relatively new initiative. As a result, more information is required to better understand, market, and provide desired products and services to potential and existing markets. Without the knowledge base provided by the research, it will not be possible to effectively provide and market watchable wildlife products and programs. Consequently, the potential economic benefits will not be realized.

This chapter describes some of the key areas that need to be addressed. The research topics that are considered to be of immediate concern, particularly the resident market research, are presented in more detail than the others. Each topic will require the preparation of a study plan prior to implementation.

Research requirements will need to be evaluated on an on-going basis. Research is a continuous series of studies which refine knowledge and keep up with changing markets.

4.1 Market Research

i) Resident Market Research

Little is known about Alberta resident participation in wildlife-related activities, motivation for participation, barriers to participation and other factors that encourage use. Since there is a very large existing and even larger potential Alberta residential market for wildlife tourism and recreation, this information base is critical for planning and marketing.

Study Objectives

. to examine and describe Alberta residents' awareness of wildlife viewing opportunities, participation in

wildlife-related activities (consumptive and nonconsumptive) and interest in participating;
- to identify the socio-demographic characteristics of participants and non-participants;
- to identify characteristics of participation;
- to measure attitudes and preferences;
- to establish a computer data base; and
- to recommend requirements for future resident market research.

Study Requirements

- review secondary data sources (i.e., National Wildlife Surveys) to specify data gaps and determine how existing data can be used to supplement this data base;
- design appropriate data collection methods;
- determine appropriate levels of regional data disaggregation;
- determine appropriate levels of participant and non-participant data disaggregation;
- identify resident wildlife-related activities (consumptive and nonconsumptive);
- identify motivation for participation;
- determine preferences for activities, species, and support services;
- measure awareness of Alberta's wildlife viewing opportunities and resources;
- measure awareness of Alberta Government Watchable Wildlife Programs;
- identify barriers to participation;
- identify factors that would encourage more participation;
- measure willingness to pay for various viewing activities;
- identify attitudes towards and relationships between consumptive and nonconsumptive wildlife-related activities;
- identify socio-demographic characteristics of participants and non-participants;
- compile a computer data base;

. determine requirements and methods for future research; and
. prepare a report of study findings.

Data Collection

There are alternative methods of data collection that can be utilized. Their selection will depend on the time and budget available to do the work.

The initial data set should be quite extensive and comprehensive. Follow-up projects can then be more focused and guided by the results of the initial plan.

The sample size should initially be approximately 5000 individual respondents. This large size is required to maintain acceptable levels of confidence at all levels of disaggregation. For example, a sample of 5000 will, assuming a constant participate rate of 22% for primary purpose wildlife-related trips, result in 1100 respondents in this group (screening could allow for a higher proportion but larger data collection costs). Sample disaggregation will also be necessary on a regional basis and by various socio-economic variables (sex, age, income, education).

The sample will need to be regionally stratified. Randomness can then be used to represent the various socio-economic characteristics according to their distribution in the population. A screening grid system will be necessary in selecting the respondent in each household to ensure representation across all sex and age groups.

The most cost-effective method of data collection will be the telephone survey. It ensures representation of socio-economic and demographic characteristics in the population and a response rate that is typically quite large, resulting in a minimum bias.

Using a mail-out survey does not readily permit random selection of the respondent in the household. Additionally, lower response

rates often result in bias that is difficult to specify. With the reminders that are necessary, the cost is often as great as or greater than conducting surveys by telephone.

Personal interviews are always preferable; however, the high cost of these is usually prohibitive.

Focus group sessions (between 6 and 12) could be used to obtain more in-depth qualitative data. This is often effective as a method of providing supplementary information to the broad-based quantitative data set.

ii) **Non-Resident Market Research**

Virtually nothing is known about non-resident activities and preferences for wildlife viewing in Alberta. We do know that there is a very large wildlife viewing market in the U.S. and western Europe and that visitors to Alberta rate the province's resources highly.

The study objectives and requirements presented above for the resident market research apply to a large extent to this area of research.

Specific topics that need to be addressed include:

- preferences (activities and species)
- levels of satisfaction
- trip purpose and other trip characteristics
- wildlife viewing related to other trip purposes and activities
- barriers to wildlife viewing
- motivational factors
- linkages with other products and packages
- travel methods
- socio-demographic characteristics

The data collection should focus on visitors from the U.S., particularly the western and mid-western states and select eastern U.S. cities; Western Europe; and Japan.

Methods of data collection can vary and can also be quite costly. It would be ideal to do this data collection jointly with other Alberta visitor exit surveys. If this is not possible, a visitor exit survey dedicated to this topic would need to be developed and implemented.

iii) **Tour Operator Markets**

Some tour companies from eastern Canada and the U.S. now offer tours with wildlife viewing, particularly bird watching, as part of the activity package. However, we know very little about the tour operators, their characteristics, their interests in watchable wildlife and their potential to bring tourists to Alberta.

In order to realize this market potential, the following should be addressed:

- identification and categorization of tours with existing or potential wildlife viewing activities
- linkages with other products and packages
- viewing product requirements
- related service requirements
- barriers to wildlife viewing activities
- factors that would encourage wildlife viewing
- socio-demographic characteristics of tour participants
- preparation of materials promoting watchable wildlife opportunities for tour operators

This work can be done through consolidation of available information on tour operators who come to Alberta or have the potential for doing so. It would then need to be followed with a survey of the operators to identify their potential and specific requirements for wildlife viewing products.

4.2 Product Development Research

i) Private Sector Operators

There is no comprehensive inventory of private sector operators who offer wildlife viewing products and those who may be interested in providing such products.

In order to realize this potential and produce a registry of private sector operators, research should focus on compiling a detailed listing of all existing and potential operators and the types of services they provide. The following are required:

- listing of guides/outfitters, tour operators, backcountry lodges, bed & breakfast and other nature-oriented operators
- categorization by type and quality of service
- contact information
- requirements for product development assistance
- requirements for marketing assistance
- requirements for interpretive training
- resource and operating security needs
- needed operating guidelines and regulations

This can be done through a survey of private sector operators and through working with them in group discussion sessions.

ii) Listing and Mapping of Wildlife Attractions

The existing wildlife viewing data base is poorly organized in terms of its accessibility to private tour operators and tourism planners.

In order to produce a comprehensive listing and mapping of Alberta wildlife attractions, research should focus on compiling information from existing Environmentally Significant Areas studies, Critical Wildlife Habitat Maps, and interviews with tour operators, non-government organizations, and wildlife professionals. In addition to

the wildlife and ecosystem characteristics, the research should add to the knowledge of the existing infrastructure, sensitivity, carrying capacity, and relationship to other tourism products.

iii) **Relationship of Consumptive and Watchable Wildlife Activities**

Because the consumptive and wildlife viewing markets share the same resource and land base, there is a potential conflict between the two activities.

In order that the activities of the two markets are compatibly developed and promoted, the following research is required:

- review survey research to identify the extent and characteristics of the overlap in the markets;
- review approaches in other jurisdictions;
- identify the resource and product utilization overlap in Alberta; and
- develop strategies to mitigate conflicts and enhance the compatible aspects of the two types of activities.

iv) **Identification of Promotions in Other Jurisdictions**

Little is known about the promotional campaigns of watchable wildlife programs in other countries and provinces.

Research into the success and failures of other wildlife and tourism agencies in wildlife viewing tourism would assist with developing and refining strategies in Alberta.

v) **Out-of-Province Media and Marketing Forums**

Out-of-province media for effective advertising and documentary coverage of watchable wildlife have not been well documented.

Identification of specific writers, media (electronic and print) and other marketing forums such as trade shows and key travel promoters is required.

vi) **Monitoring of Pilot Promotional Campaigns**

In order to make the necessary improvements in products and future campaigns, feedback from pilot promotions will be necessary.

Monitoring of campaigns through wildlife tourist interviews and reader response cards coded to specific publications will provide some of the necessary data.

vii) **Identification of Mitigation Procedures**

The effects of wildlife viewing on sensitive species are not well understood.

There needs to be specific research into the impact of wildlife viewing on indicator species and habitats and methods of improving viewing etiquette and ethics.

4.3 Other Supporting Research

i) **Modifications of Future National Wildlife Surveys**

Although the National Wildlife Surveys on the Importance of Wildlife to Canadians provides substantial information on wildlife-related activities, it could be modified to become more relevant for Alberta use. Potential modifications include:

- where do Albertans travel to view wildlife (in Alberta, outside Alberta, distance from home, location in Alberta)?
- location of expenditures
- better description of viewing activities
- preferences
- motivation and attitudes
- barriers

- a better definition of what constitutes a trip in the category "primary nonconsumptive trip"
- segregation of daily trip activities from multi-day trips

ii) **Government Policies and Programs**

Other government programs often work at cross-purposes with respect to the development of wildlife viewing initiatives. The various conflicts and cost-benefit analyses of the various programs are not well documented.

In order to resolve the conflicts with other government programs, research should focus on activities in all government departments (especially provincial, but also municipal and federal) which impact on current and potential watchable wildlife programs and identify methods of modifying programs to resolve conflicts. Cost-benefits analyses (including non-market values) should be undertaken to determine long-term values of the various conflicting programs and where government priorities should be.

iii) **Analysis of Economic Benefits**

Wildlife viewing tourism can contribute substantially to Alberta's economy by helping to promote the province's developing tourism industry. Substantial economic benefits can be realized through the development of watchable wildlife programs. This requires an appreciation of the impacts of other projects or developments that may affect wildlife viewing opportunities.

Understanding the cost and benefits of wildlife viewing tourism will assist with identifying the total benefits and costs of major industrial development projects.

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